

**Portfolio Annual Report 2009:
Community Sustainability and Quality of Life**

**United States Department of Agriculture
Cooperative State Research, Education, and Extension Service**



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Executive Summary

A Nation in Crisis

Every day in America the media is filled with distressing news about significant issues facing our country. The world economy is close to collapsing, many families have lost their homes and other financial assets, many communities are struggling to survive, families are under tremendous stress, obesity and other negative health issues are on the rise, our educational systems are not working, and youth are not prepared for the 21st century. While these issues affect all citizens in all locations, rural areas are especially vulnerable.

Importance of Rural Areas

While there is a persistent and substantial disparity between rural and metro wealth and income, rural areas are extremely important to the overall health and well-being of our country. Food and Agricultural commodities in rural America contribute almost \$200 B to the U.S. economy and produce food to feed about 300 million people in the U.S., and contribute significantly to the food supply of millions of people around the world. In 2006 \$71 B of agricultural exports produced an additional \$117.2 B in economic activity for a total economic output of \$188.2 B. Agricultural exports generated 841,000 full-time civilian jobs, which include 482,000 jobs in the nonfarm sector.

Rural Conditions

Rural families face economic challenges as they typically earn 48% of what metropolitan workers earn with 40% coming from unearned income, such as Social Security. Children made up 24.8 percent of the U.S. population in 2007, yet represented 35.7 percent of those living in poverty. Further, the poverty rate is greater for children in families living in more sparsely settled rural areas.

Children in rural areas have higher mortality rates when compared with metro counterparts, tend to have higher rates of obesity, injury, socio-emotional difficulty, and moderate to severe health conditions. Although 20% of Americans live in rural areas, only 9% of the nation's physicians practice there. Rural residents are more likely to report fair to poor health status, having diabetes, being obese, and not meeting national guidelines for physical activity.

Youth in rural areas are often isolated, lack opportunities for meaningful employment, have limited opportunities for positive developmental experiences, and travel long distances to school which limits opportunities to interact with families, peers, and communities. Often parents are commuting long distances to work which often leaves youth alone afterschool, the time in which youth tend to engage in unhealthy, risky behaviors. Educational issues are significant. Approximately \$2,000 less money is spent per rural student on education than on metro counterparts and the dropout rate is higher.

Overall Internet usage in rural communities is 15% less than user counterparts in metro areas. Additionally the percentage of households with a computer and modem line are much lower in rural communities than in urban areas. Economic restructuring has driven the rapid expansion of small scale businesses in rural areas. These small businesses often lack the depth of technological expertise to keep up with the demands of the market.

Family structures and stresses are important factors in the overall health of our country. Two out of 3 mothers of preschool-age children and 3 out of 4 mothers of school-age children are in the labor force. This makes the need for quality child care and after-school programs vitally important in order for children to develop into healthy adults and for families to have an income. More than 2.5 million grandparents are raising their grandchildren. Strong and supportive parents help protect adolescents against a variety of risky behaviors. Conversely, divorce is linked to academic and behavior problems, depression, antisocial behavior, impulsive/hyperactive behavior and school behavior problems.

In the area of homes and home environments areas of particular concern include lead-base paint poisoning, asthma, lung cancer, healthy drinking water, injuries and deaths from accidents, and medical costs. Understanding all aspects of home ownership is particularly critical in today's financial turmoil.

CSREES in Partnership with Land-Grant Universities Respond

The CSREES and Land-Grant universities are responding to these issues. A broad array of teaching, research, and Extension programs are developed and delivered to... and with...citizens across the country by land-grant university faculty in every state and territory.

These program areas include, but are not limited to:

- Individual and Family Resource Management and Consumer Economics
- Community Resource Planning and Development
- Healthy Living
- Community Institutions, Health, and Social Services
- Human Development and Family Well-Being
- Sociological and Technological Change
- Human Environmental Issues
- 4-H Youth Development

Measuring and Articulating Results

CSREES and Land Grant University programs result in hundreds of examples of impacts on citizens and communities. The interaction of children, youth, peers, families, and others all occur in the context of schools, places of worship, communities, the natural environment, and the global society. Just as these interactions and dynamics are complex, so are the ways in which on community impacts are is measured. Community

improvement cannot be measured by just one dimension, but by several. In this portfolio, community impact is articulated by increasing “capital” in all of the following areas: human, social, civic/political, cultural, natural, financial, and built (infrastructures).

Improving the Lives of Children, Youth, and Families and the Communities in which They Live

As a result of the programs selected for inclusion in this portfolio, as well as the thousands of programs not included, the lives of children, youth and families...and the communities in which they live...have been positively impacted. For example:

Human Capital

- Youth and adults have decreased their consumption of sweetened beverages and increased consumption of water, decreased calorie intake, increased physical activity, and can differentiate between healthy and unhealthy foods.
- Child care providers improved the learning environments of their programs and their own teaching strategies.
- Youth increased skills for job searches, communication, and interviewing as well as skills in reading, math and science.
- Individuals caring for Alzheimer’s patients improved coping skills to be better prepared to care for loved ones.
- Parents became more involved and supportive of their children.
- Individuals have limited use of products with volatile organic compounds, removed biological hazards in their homes, corrected moisture levels in the home, and controlled indoor air contaminants.
- 4-H youth are more likely to go to college and contribute to their communities than the general youth population.

Social Capital

- Parents have adopted effective practices in parenting such as, motivating nurturing, and guiding their children.
- Using geospatial technology youth and adults mapped community evacuation routes and shelters for the community to use in the event of a disaster.
- Hunger has been reduced.

Civic/Political Capital

- Businesses and organizations were stimulated to promote or create new opportunities for teens, teens were offered jobs, and teens experienced new opportunities to encourage them to live and work in their community as an adult.
- Youth serve as leaders in their community and are less likely to be involved in negative behaviors.

Cultural Capital

- Hispanic youth have gained leadership skills and increased their likelihood to attend college.

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- Youth like to learn from people from other countries by being directly connected electronically.
- Workforce training for Indian reservations has been developed.

Natural Capital

- Outdoor recreation and trail routes are efficiently managed, maintained and accessible through newly developed software systems.
- Youth increased understanding of the issues facing local governments and management of natural resources as well as choosing the natural resource area as a career.
- New erosion control materials have been developed.

Financial Capital

- Youth and adults have opened new savings accounts and pledged to save money. Secondary data indicates 2/3 of people who make pledges either save the partial or full amount they have committed.
- Manufacturers have stimulated millions of dollars into the economy and created or retained jobs.

Built Capital

- Through technological infrastructures, a new mental health delivery software system and tele-portal based health care delivery hardware is ready to start facilitating long-distance care.

Epilog

Based on the evidence presented in this portfolio, it has been demonstrated that the lives of children, youth, and families... and the communities in which they live...are improved. As community capital is improved in the seven areas used as the foundation of this work, the Nation will be strengthened through ***“Vibrant communities in which strong families, healthy people, and successful youth thrive.”***

COMMUNITY SUSTAINABILITY AND QUALITY OF LIFE

Portfolio at a Glance

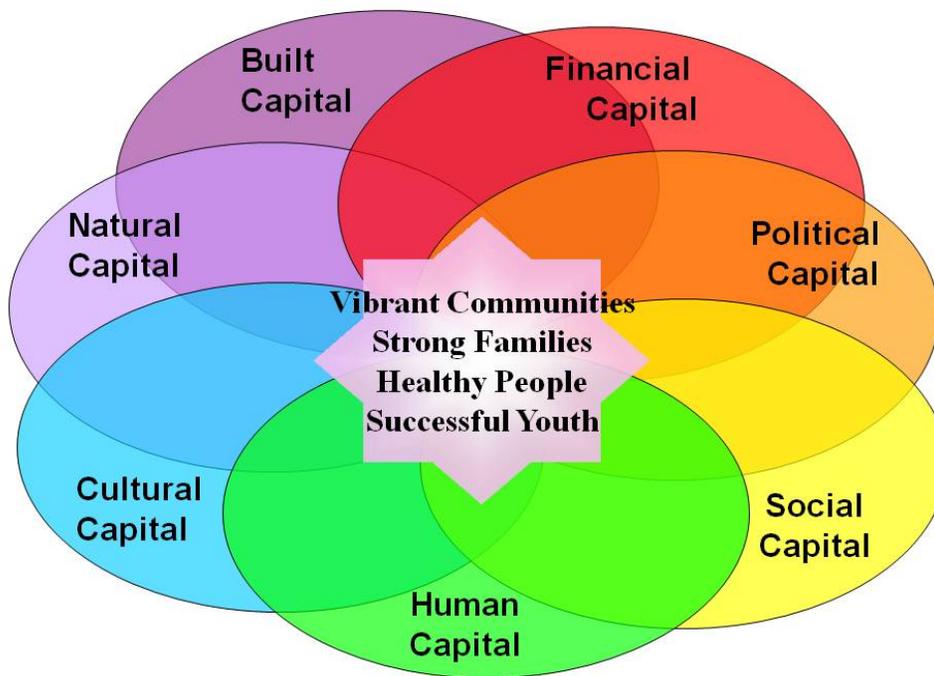
Portfolio Vision

Vibrant Communities in which Strong Families, Healthy People, and Successful Youth Thrive.

Portfolio Mission

To sustain and improve human, social, cultural, civic, natural, financial and built capitals through strategic program leadership and management of federal funds.

Community Capitals Framework



1

Logic Model

The logic model on the following page represents the work in this portfolio. It guides and frames the work to achieve the vision through improving the seven areas of community capital referenced above.

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Situation	Inputs	Activities	Outputs	Outcomes		
				Knowledge	Actions	Conditions
<p>Situation: Rural America is home to 49 M people (20% of the nation's population) and comprises 75% of the nation's land. Food and Agricultural commodities in rural America contribute almost \$200 B to the U.S. economy and produces food to feed more than 280 M people in the US and millions more around the world. Therefore, it is extremely important to our country and world that diverse rural areas remain vibrant with assets such as: well prepared & financially strong families, growing economies, positive & healthy home environments, education & health systems, successful youth, & employment & technology opportunities. Through federal financial assistance and national program leadership, CSREES provides research, education, and extension programs that improve the lives of individuals & the communities in which they live.</p>	<p>Funding Sources:</p> <ul style="list-style-type: none"> - Federal Gov't. Competitive Grants Formula Funds Special Grants - State Gov't. Funds to Match Federal Dollars -County Gov't. Funds to Support County Programs, Offices & Staff -Private Funds Foundations Corporate Individuals -In-kind Resources Space, food, transportation, etc. <p>Human Resources:</p> <ul style="list-style-type: none"> -Federal, state & county program and administrative staff - Grantees - Stakeholders - Volunteers -Citizens (adult & youth) -Community Leaders -Business & Industry 	<p>Research (Basic & Applied):</p> <ul style="list-style-type: none"> -Hatch & Evans Allen Projects -Multi-state Projects -Program Evaluations -University Funded Research <p>Education:</p> <ul style="list-style-type: none"> -Formal college instruction -Post-secondary degree/certificate programs -Fellowships, scholarships, internships, service learning <p>Extension:</p> <ul style="list-style-type: none"> -Dissemination of information -Educational programs tailored to meet individual & community needs -Professional development opportunities for staff -Developing collaborations <p>Integrated:</p> <p>Programs that combine teaching, research, and/or Extension to improve communities, the lives of people and/or policies.</p>	<ul style="list-style-type: none"> -New scientific knowledge that improves human conditions -Print, on-line, & technology based information -Educational programs for children, youth, families & communities -Participants reached -Students graduating in certificate/degree programs -Collaborations established -Public and private support -Communities reached -Entrepreneur & economic development programs 	<p>Youth & adult participants understand concepts related to:</p> <ul style="list-style-type: none"> - Human Development and Family Well-Being. -Consumer Decision-Making -Individual & Family Financial Management -Safe, Affordable Housing, Indoor Air Quality, Water & Home Energy -Human Environmental Issues -Nutrition & Healthy Living -Employment & Technology -Community Resource Planning & Development -Youth Development -Leadership & citizenship -Diversity & globalization 	<p>Youth and adult participants apply knowledge to improve their:</p> <ul style="list-style-type: none"> -Own lives and the families & communities in which they live -Consumer Decisions -Wealth, savings, & business opportunities -Housing & environmental conditions -Nutrition & health -Technology & employment skills for the 21st Century -Chances for success -Community living conditions & economic vitality -Leadership & citizenship influence in demographically diverse communities & global society. 	<p>Vibrant communities enjoy the benefits of healthy people, strong families, & successful youth through investments & improvements in:</p> <ul style="list-style-type: none"> -Human Capital -Social Capital -Financial Capital -Civic/Political Capital -Natural Capital -Cultural Capital -Built Capital
<p>Assumptions – When armed with appropriate research-based information from the nation's land-grant universities, people have the ability to solve their own problems, improve their current and future lives, and strengthen the rural communities in which they live.</p>		<p>External Factors - Financial, legislative and policy constraints; diminishing resources and staff at land-grant institutions; changing priorities and needs; demographics; socio-economic conditions; and human and natural disasters are among the external factors impacting research, education, and extension activities and the degree to which personal and community conditions can be improved.</p>				

Section I: Portfolio Overview

Portfolio Planning

Introduction:

A thumbnail sketch of this entire portfolio is captured in the preceding two pages. The vision and mission drive the work. The Community Capital Framework is used to articulate the work of this Portfolio and capture the results. The work represented in this Portfolio may appear on the surface to be a broad array of disparate efforts. However, the Community Capital Framework shows that there is no one way, one program, one agency, one organization, or one approach is sufficient to improve an entire community. Rather, achieving *community sustainability and quality of life* requires multiple and integrated approaches in seven different areas.

Further, research models--based on a comprehensive ecological framework--reflect the complexity of the interactions, interrelations, and dynamics in a community. Just as community dynamics are complex, so are the program interventions that are required to make a difference in long-term conditions.

The Logic Model on the preceding page provides a quick visual overview of the complex work represented in this Portfolio. The information on the logic model is explained and documented in more detail throughout this document.

CSREES provides national program leadership and federal assistance that supports teaching, research, and Extension programs at Land Grant Universities. As evidenced in this Portfolio, these programs are effectively improving communities and making significant strides toward reaching the vision.

Background: A Nation in Crisis

Every day in America citizens pick up the newspapers, log onto computers, and turn on televisions to learn about significant issues facing our families and communities. The world economy is close to collapsing, many families have lost their homes and other financial assets, many communities are struggling to survive, families are under tremendous stress, obesity and other negative health issues are on the rise, our educational systems are not working and youth are not prepared for the 21st century.

While these issues affect all citizens in all locations, rural (non-metro) areas are especially vulnerable. In a national survey released by the W.K. Kellogg Foundation, (W. K. Kellogg, 2002) 1,030 of the nation's state legislators found wide agreement about the economic development needs of rural areas, with 86 percent of respondents agreeing that people in rural areas have fewer opportunities than those who live in cities or the suburbs.

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According to the survey, the most serious problems facing rural America are the lack of opportunity for young people (38%), the decline of the family farm (31%), access to health care (28%), low-wage jobs (28%), access to quality education (18%), overdevelopment and sprawl (14%), access to technology (8%), access to transportation (8%), the breakdown of the family (6%), and the environment (5%).

What is Rural? In 2003, the Office of Management and Budget released the Census 2000 version of metropolitan (metro) and nonmetropolitan (nonmetro) areas, a classification system often used to define urban and rural America. In this update, nonmetro America comprises 2,052 counties, contains 75 percent of the Nation's land, and is home to 17 percent (49 Million) of the U.S. population (Measuring Rurality: New Definitions in 2003). When "rural" is used in this portfolio, it will mean the same as "nonmetro."

Why is Rural America important? Food and Agricultural commodities in rural America contribute almost \$200 B to the U.S. economy, produce food to feed about 300 M people in the U.S. and contribute significantly to the food supply of millions of people around the world. America's and much of the world's food and fiber come from rural America. U.S., agricultural trade, which originates in rural America, generates employment, income, and purchasing power well beyond the farm and into the nonfarm sectors. Each farm export dollar earned stimulated another \$1.65 in business activity in calendar year 2006. The \$71.0 billion of agricultural exports in 2006 produced an additional \$117.2 billion in economic activity for a total economic output of \$188.2 billion. Agricultural exports generated 841,000 full-time civilian jobs, which include 482,000 jobs in the nonfarm sector (Rural America At A Glance 2008 Edition, 2008).

But rural communities are much more than agriculture and natural resources. Increasingly, agriculture depends on wages earned off the farm. Nationally, 82% of all farm household income comes from off-farm sources. Even large family farm operators rely on off-farm sources for up to 30% of their household income (Why Rural Development Investments are Critical to the Future of America's Farm Families: Seven Considerations for Committee Review, 2007). However, the non-farm rural economy is in trouble. Manufacturing jobs have declined. The historic reliance in rural places on natural resource-extraction is broken. The economic crisis sweeping across the country is adding to this distress, increasing the rates at which jobs are being lost and associated health care and retirement plans vanish.

In response to this economic shift, there is a surge in rural self-employment and small business creation. More than 5.3 million persons are self-employed in rural America today, and estimates suggest that 1 in 3 will be self-employed by the years 2015 (Goetz, 2008). But this surge does not mean that entrepreneurs, the people who have decided to launch their own businesses, are alive in well in rural America. To survive, even thrive, this emerging sector of the economy needs ready access to research, education, and technical assistance support. Communities need assistance as well to create a climate supportive of entrepreneurial and creative economic development.

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This is the broad landscape against which the nation's food, fiber, fuel are produced and where renewable sources of energy are discovered and developed. Yet this landscape is changing rapidly. Today, the people and the places that make up rural America are experiencing profound changes, and these changes challenge the capacity of the land grant university system and its federal partners to meet their needs. Increased, innovative, and leveraged investments in rural development are called for as social, economic, technological, and demographic changes challenge the ability of rural residents to survive, no less prosper. Many rural residents still contend with entrenched, persistent poverty. The land grant system needs to prepare to help youth, families, farmers, ranchers, and business innovators succeed in these dynamic economic times.

In order to strengthen rural communities and the citizens who reside within them, this portfolio employs a number of programs that focus on: individual economies, community economies and development, families, youth, environments, health, and technology. Examples of data that support the compelling argument for CSREES and land-grant university outreach to rural communities in these areas include:

Community Economies

There are many challenges and opportunities related to improving quality of life in rural America. For example, population shifts are occurring across the country. In some locations young people are leaving rural areas, resulting in net out-migration while in other areas, older people are retiring to rural locations. This results in net in-migration and shifting patterns of land use.

Although rural areas receive more per person for agriculture and natural resources, human resources, and income security payments, such as Social Security and Medicare (Rural Income, Poverty, and Welfare: Rural Welfare, 2003), there is a persistent and substantial disparity between rural and metro wealth and income (ERS/USDA Briefing Room, 2003). Rural poverty rates are over 5% higher than comparative metro rate (Indicators, 2008), and other indicators of quality of life underscore the differences.

Individual Economies

Financial and social challenges confront many rural Americans. Financial planning, managing risks of loss, reducing household debt, and saving and investing to meet life goals are all essential, yet may be neglected by people dealing with issues perceived to be more immediate and more pressing. In communities with limited savings and resources, critical capital lags, compounding resource inequities over time.

Thirty-seven million Americans live below the official poverty line. Millions more struggle each month to pay for basic necessities, or run out of savings when they lose their jobs or face health emergencies (The Center for American Progress Task Force on Poverty, 2007).

Fourteen percent of the Nation's rural population lives in persistent poverty counties (Rural Income, Poverty, and Welfare: High-Poverty Counties, 2004). Families living in all rural areas typically earn 48% of what metropolitan workers earn with 40% coming from unearned income, such as Social Security (U.S. Bureau of Economic Analysis, 2000). Over one-fifth of agriculture based households have an income of less than \$15,000 annually (Bailey, 2003) and more than one out of every four rural Hispanics, Blacks, and Native Americans live in poverty (Rural Development Research Report Number 100, 2004).

Children made up 24.8 percent of the U.S. population in 2007 yet represented 35.7 percent of those living in poverty. Further, the poverty rate is greater for children in families living in more sparsely settled rural areas (Rural America At A Glance 2008 Edition, 2008)

Four out of 10 U.S. workers often or always live from paycheck to paycheck. Women are more likely to live paycheck to paycheck, (47% women, 36% men) and to say they do not have enough income to live comfortably (41% women; 29% men) (Wulfhorst, 2007). Personal saving as a percentage of disposable personal income, now at 2.8 percent, may be near zero or negative when outlays are financed by borrowing, by selling investments, or by using savings from previous periods (News Release: Personal Income and Outlays, 2009).

The average credit card debt of a low- and middle-income indebted household is \$8,650 and 7 in 10 households use credit cards as a safety net to pay for repairs, basic living expenses, and medical expenses (Brown, 2005).

About 12 million borrowers now owe more than their homes are worth—double the number from 2008 and expected to rise to nearly 15 million in 2009—while another 8.1 million foreclosures are expected over the next four years. Over 1 in 10 Americans are in mortgage default (Abromowitz, 2009).

The retirement expectations of the vast majority of Americans have taken a turn for the worse in 2009, leaving a record-low 13 percent saying they are very confident of having enough money to live comfortably in retirement, according to the (Employee Benefit Research Institute, 2009) released by the nonpartisan (Employee Benefit Research Institute). Among workers, those feeling very confident about retirement has tumbled by one-half in the last 2 years. Workers overall who have lost confidence most often cite the recent economic uncertainty, inflation, and the cost of living as primary factors.

Health, Health Behaviors, and Access to Healthcare Services

Rural children have higher mortality rates than do their metro counterparts in all age groups and poor children who reside in rural areas tend to have higher rates of obesity, injury, socio-emotional difficulty, and moderate to severe health conditions than do poor metro children (Rural America At A Glance 2008 Edition, 2008).

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In comparison to metro counterparts, rural residents were more likely to: report fair to poor health status (19.5% vs 15.6%); report having diabetes (9.6% vs 8.4%); be obese (27.4% vs 23.9%); and not meet CDC recommendations for moderate or vigorous physical activity (44 vs 45.4%) (Bennett KJ, 2008).

Rates of diabetes were markedly higher among rural American Indian (15.2%) and black adults (15.15); and rural black adults were less likely to meet recommendations for physical activity than other rural residents (Bennett KJ, 2008).

Rural residents are more likely to be uninsured than urban residents (17.8% vs 15.3%); Hispanic adults were most likely to lack insurance, with uninsured rates ranging from 40.8% in rural micropolitan counties to 56.12% in small remote rural counties (Bennett KJ, 2008).

Although 20% of Americans live in rural areas, only 9% of the nation's physicians practice there (American Public Health Association, 2009). Therefore, residents in remote rural counties were least likely to have a personal physician (78.7%) (Bennett KJ, 2008).

Rural white adults were more likely to report having a personal health care provider than were other adults. Among Hispanic adults, the proportion with a personal provider ranged from 60.4% in rural micropolitan counties to 47.7% in remote rural counties. Rural adults were more likely than urban adults to report having deferred care because of cost (15.1% vs 13.1%) (Bennett KJ, 2008).

Youth

More than 13 million young people ages 5-19 live in rural America. Of that population, approximately 2.6 million rural children are poor, constituting 35% of the rural poverty population. Almost half (46%) of all non-Hispanic Black children living in rural areas are poor; 43% of rural Native American children are poor (Jolliffe, Rural Poverty at a Glance, 2004).

Often residents of rural areas commute long hours to work (Aldrich, 1997). For youth, that translates into fewer career opportunities to explore, fewer adults modeling responsibility and service to the community, and more unsupervised free time (Carnegie, 1992; Carnegie, 1995). This time can be an opportunity for positive development, or a chance for negative activities (Perkins, 2000; Villaruel et al, 1994).

Rural America is often geographically isolated, making it very difficult for youth and families to have access to the opportunities for skill and competency development (Weisheit, 1995). Further, the physical distance between homes and small towns and a lack of public transportation are two major causes of isolation in rural America. Adding to this dilemma is one of the most commonly mentioned crises in rural America ... the disappearance of many local gathering spots (Childress, 1993). These spots are important because they are places where youth can interact with peers and adults.

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Educational issues are significant. According to the Rural School and Community Trust (2002) there is about \$2,000 less money spent per rural student on education than on metropolitan student counterparts. There is a higher dropout rate among rural students (20% as compared to 15% of urban students). There is increased school consolidation (despite evidence that smaller schools are better) which leads to long bus rides...sometimes 3 hours each way...and less time for young people to engage in their communities (The Rural School and Community Trust, 2002).

Rural culture may be characterized by prejudice, ethnocentricity and intolerance to nonconforming ideas (Ballard et al, 1996). These contrasting sets of values provide environments for violence in rural schools. Ballard goes on to state that there has been an increase in schools of problem behaviors among students and violence.

Educational issues for non-white youth are particularly troublesome. Rural Hispanics have the highest ratio for dropping out of high school (51%) and urban blacks are twice as likely to have college degrees as rural blacks (Gibbs, 2004).

More than ever young people need to understand concepts of personal finance. However, the average score by high school seniors on a personal finance literacy test in 2008 was just 48.3 percent (JumpStart Coalition). In addition, the average college student gets between 25-50 credit card solicitations a semester and has an average of 2.8 cards in their own name (College Credit Card Statistics, 2008). In other financial aspects, opportunities for meaningful youth employment are scarce in rural areas as compared to urban settings (Carnegie, 1995).

Technological Change

The growing importance of technology in a competitive global economy requires increased levels of employment skills. However, overall Internet usage in rural communities is 15% less than user counterparts in metropolitan areas. That number drops significantly when race is factored in (Rainie, Peddy, & Bell, 2004).

According to the Department of Education, National Center for Education Statistics, youth who live in rural areas have a higher percentage of instructional rooms (classrooms, computer labs, library/media centers) with access to the Internet than youth who live in the city (city, 52%; urban fringe, 67%; town, 72%; rural, 71%). However, the percentage of households with a computer and modem line are much lower in rural communities than in urban areas, although this varies by income level (U.S. Department of Commerce, 1995).

Family Well-Being

Two out of 3 mothers of preschool-age children and 3 out of 4 mothers of school-age children are in the labor force. Six in 10 preschool-age children and 7 in 10 school-age children have all parents in the labor force (Children's Defense Fund, 2008).

More than 2.5 million grandparents are raising their grandchildren. Almost 80 percent of them have been caring for their grandchildren for a year or longer; 60 percent of them are in the labor force; and about 1 in 5 of them is poor (Children's Defense Fund, 2008).

Approximately 2.3 million individuals earn a living caring for and educating children under age 5 in the United States, of which about 1.2 million are providing child care in formal settings, such as child care centers or family child care homes. The remaining 1.1 million caregivers are paid relatives, friends or neighbors (The National Association of Child Care Resource & Referral Agencies, 2006). Providers with specialized training are more likely to be nurturing, reinforce early literacy skills, and challenge and enhance children's learning (The National Association of Child Care Resource & Referral Agencies, 2008). However, rural children beginning kindergarten and first grade have the lowest reading and math scores of all children tested by region. This is considered due to lack of early childhood intervention (Devarics, 2005).

About two-thirds of public school 4th graders cannot read at grade level; 6 out of 10 cannot do math at grade level. More than 80 percent of Black and Hispanic 4th graders in public school cannot read at grade level, compared with 58 percent of their White peers. Eighty-five percent of Black 4th graders in public school cannot do math at grade level, compared to 78 percent of Hispanic children and about half of White children (Children's Defense Fund, 2008).

Adolescents who have a high-quality relationship with one or both parents are much more likely to be mentally healthy, perform well in school, and have positive relationships when they become adults (Hair, Jager, & Garrett, 2002).

Strong and supportive ties with parents help protect adolescents against a variety of risky behaviors, including substance abuse, early sexual activity, pregnancy, emotional distress, suicide, and violence, according to a review of data from the (National Longitudinal Study of Adolescent Health, 1997). Conversely, divorce is linked to academic and behavior problems among children, including depression, antisocial behavior, impulsive/hyperactive behavior, and school behavior problems (Wang & Amato, 2000).

Summary of Rural Conditions

In summary, while rural areas are extremely important to the nation's economy and to a great extent form the fabric of our society, residents have lower incomes, are more likely to live in poverty, are less likely to be employed, and have lower levels of education, but are more likely to live in married-couple households (U.S. Bureau of the Census, 2000).

Therefore, it is extremely important to our country and the world that diverse rural areas remain viable with assets such as: well prepared & financially strong families, growing economies, positive and healthy home environments, education and health systems, successful youth, employment and technology opportunities.

CSREES and Land-Grant Universities Respond

While CSREES supported research, education, and extension programs impact citizens in communities everywhere...from rural, non-metro locations to the largest metropolitan areas...a large portion of work resides in rural America. A significant number of programs are administered through USDA and led by CSREES national program leaders, in partnership with the Land-Grant Universities in every state and territory. These programs have a special niche in reaching rural citizens...who often lack access to assets such as educational programs, health facilities, strong economies, employment opportunities, and transportation infrastructures.

The Land-Grant University mission is to provide programs to improve the lives of all citizens in their respective communities and states. In many cases, these programs have the greatest impact in rural communities, which typically have fewer human and fiscal resources in comparison to larger populated areas. Therefore, while the programs and references presented in this portfolio have a strong focus on rural communities, it does not exclude programs in cities and metropolitan areas.

The teaching, research, and Extension programs in this portfolio particularly address the issues outlined above. The programs are articulated below as primary and secondary Knowledge Areas (KAs). A KA is a concept that links research, education, extension and integrated activities to strategic objectives. The primary KA's are those that most directly impact the issues outlined above. The secondary KA's contribute significantly to the work, but are included as primary KA's for other portfolios. Projects are assigned knowledge areas codes by principal investigators, and are linked to portfolios based on the reported percentage of effort. KAs represent a vast number of activities.

Primary Knowledge Areas classified under this portfolio include:

- KA 801/607: Individual and Family Resource Management and Consumer Economics– how people obtain and use resources of time, money, and human capital; and the demands, preferences, and behavioral responses and needs of consumers.
- KA 608: Community Resource Planning and Development--to enhance quality of life and the understanding of problems, opportunities, and planning for renewal and growth. The following three significant CSREES funded programs are discussed within this KA:
 - The National Research Initiative (NRI) Rural Development was changed to Agriculture and Food Research Initiative (AFRI) Rural Development. This funding focuses on the creation of new knowledge and implementation of practical strategies for the development of sustainable rural communities focusing on reducing poverty; protecting the environment and enhancing community economic vitality.

- Small Business Innovation Research (SBIR) Rural Development.
The focus is on the development of new technology or for the utilization of existing technology to address important economic and social development issues or problems in rural America.
- Regional Rural Development Centers
The four USDA Regional Rural Development Centers coordinate rural development research, education and Extension programs cooperatively with the Land-Grant System universities and colleges in each of their geographic regions. Collectively, the Centers seek to strengthen the capacity of the Land Grant University System across the nation to address critical contemporary rural development issues that impact the well-being of people, communities, and businesses across rural America.
- KA 724: Healthy Lifestyle--healthy lifestyles, health literacy, and community health planning.
- KA 802: Human Development and Family Well-Being--the social, cognitive, emotional, and physical development of children, youth, and adults throughout the lifecycle, and the family life course;
- KA803: Sociological and Technological Change Affecting Individuals, Families, and Communities--change and coping related to the impact of technological, demographic, and social transitions in society.
- KA 804: Human Environmental Issues Concerning Apparel, Textiles and Residential and Commercial Structures--assisting consumers and professionals with issues related to housing affordability, healthy homes, sustainable housing, and indoor air quality.
- KA 805: Community Institutions, Health, and Social Services—the development, quality, and functioning of community institutions and social services. Work in this area enhances the scope, scale, and effectiveness of public and private community institutions and services, including emergency preparedness and response, and public safety.
- KA 806: 4-H Youth Development—programs that provide positive environments in which young people can develop competence, confidence, connections, character, compassion, and contributions. The following three significant CSREES funded programs are discussed under this KA:
 - 4-H and Military Partnerships.
The goal of this program is to promote positive youth development opportunities for military children and youth wherever they are located world-wide.

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- Children, Youth and Families at Risk Program.
This program provides educational programs to vulnerable families and communities.
- Rural Youth Development Program.
This program provides programs for youth in rural areas. The emphasis is on building leadership and personal skills in youth who can then improve their own lives and the communities in which they live.

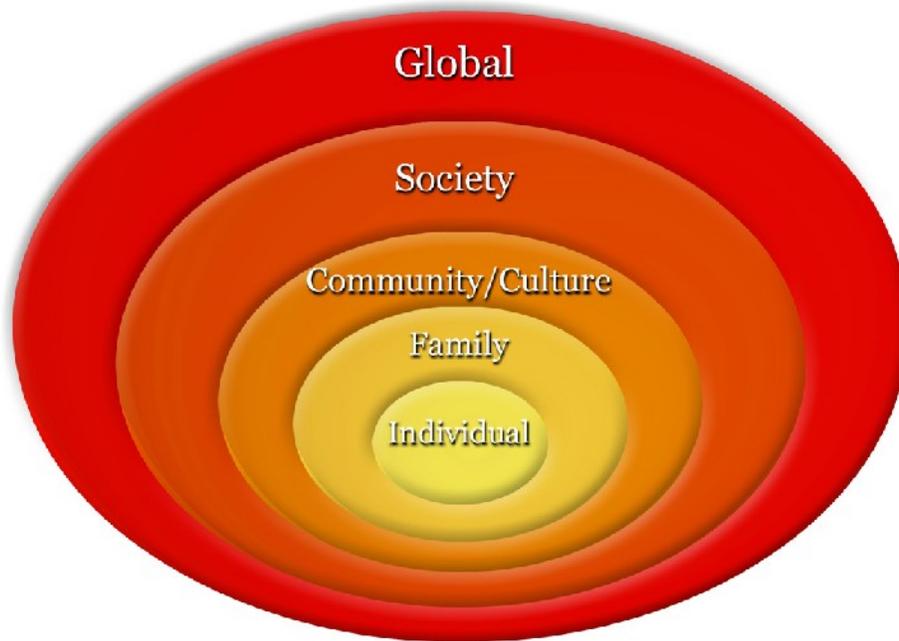
Secondary Knowledge Areas classified under this portfolio include:

- KA 703: Nutrition Education and Behavior—the assessment of food intake and dietary patterns, influencing factors, the interrelationships among these factors, and with the assessment of food and nutrient intake in relation to nutrient requirements, dietary guidance, and food plans. Related activities include the development, evaluation, and dissemination of nutrition education and strategies for professionals, students, and the public.
- KA 704: Nutrition and Hunger in the Population—the development of analytical methods and pro-active attempts at hunger reduction through food banks, communities organizing to gain farmers markets, community gardens, gardening, food buying clubs, food recovery, and gleaning.
- KA 902: SARE—Sustainable Agriculture Research and Education Program (SARE) -- increases knowledge about practices that are profitable, environmentally sound, and good for communities. It also helps farmers and ranchers adopt such practices.

The Ecology of Human Development Dictates Program Integration

At first glance, the programs represented in this portfolio may seem to be disconnected, fragmented, and disparate. However, the issues facing families are complex and therefore, need complex systemic solutions. Added to the complexity of issues are the ever changing dynamics, communications, and interconnectedness of individuals with all of the elements of society.

Uri Bronfenbrenner, among the world's best-known psychologists, worked on defining what really matters in the development of human beings for over 60 years. His model of the ecology of human development (shown below) acknowledges that humans don't develop in isolation, but in relation to their family and home, school, community and society. Each of these ever-changing and multilevel environments, as well as interactions among these environments, is key to development.



Model from Huitt, W. (1997, 1999, 2005, & 2009). Educational Psychology Interactive. <http://chiron.valdosta.edu/whuitt/materials/sysmdl.html>. Retrieved June 23, 2009.

Bronfenbrenner's work views the psychology, sociology, culture, and economics of human development as nested settings in which a person develops over time throughout the life course.

It is this theoretical framework that provides the big picture of how all of the programs represented in this portfolio work together to contribute to the development of youth, families, and communities.

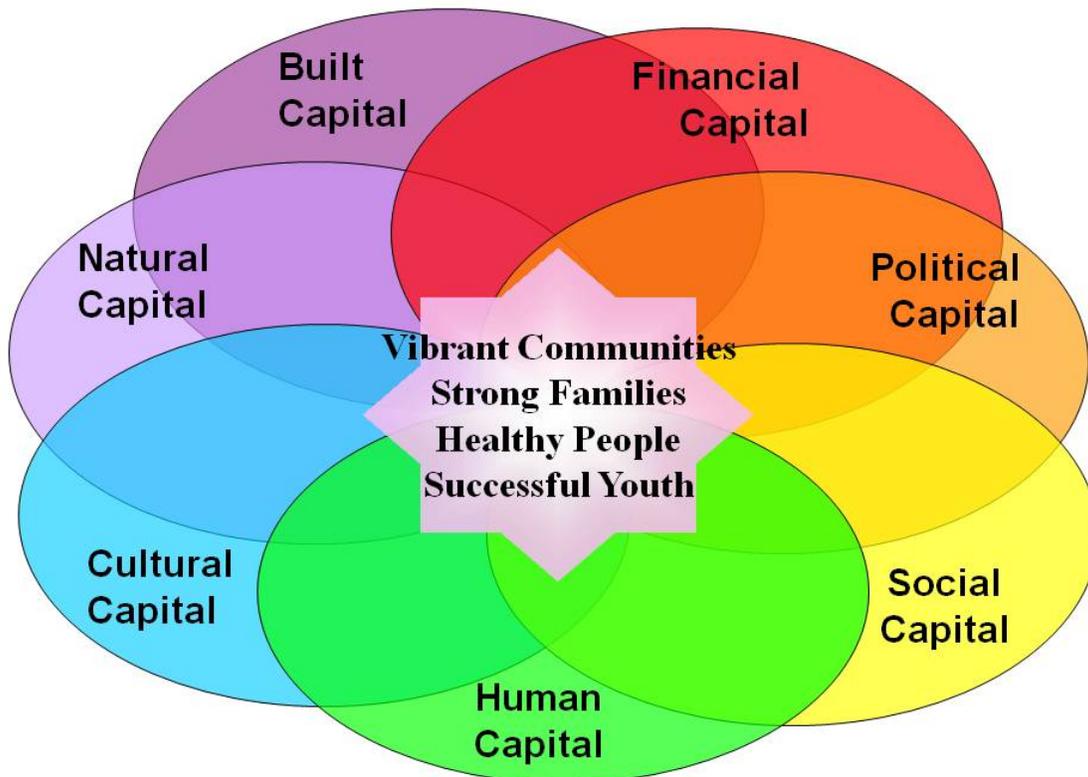
Analyzing Change and Reporting Impact Within the Community Capitals Framework

A growing network of community development researchers and practitioners use a research-based framework developed around 7 community capitals to analyze change in rural areas in the U.S. and abroad (Flora, 2006). It is this work that forms the foundation and framework for the CSREES CSQoL Portfolio. Individual programs in this portfolio strengthen human, social, civic, financial, cultural, natural and built capital to collectively produce vibrant communities, strong families, healthy people and successful youth.

The area's most significantly impacted through this portfolio include human, social, civic, and financial capital. Natural and cultural capital are addressed to some extent. Built capital represented, while is not a primary focus of this portfolio. Built capital is a much stronger emphasis in other programs in CSREES.

The following discussion and adaptation of Community Capitals is taken from the work of Flora and Flora. All communities have resources that can be reduced or dissipated, saved for future use, or invested to create new resources. When those resources are invested to create new resources over a long time horizon, they are referred to as “capital.” The capitals are both ends in themselves and a means to an end. Only by a dynamic balance among the capitals and capital reinvestments can sustainable strategies emerge to address the threats posed by a global economy, a rapidly changing climate, and other critical issues facing communities across America.

Community Capitals Framework Diagram



Natural capital refers to those assets that abide in a location including weather, geographic isolation, biodiversity, natural resources, amenities, and natural beauty. Water, soil and air – their quality and quantity – are a major building block of natural capital (Costanza, 1997; *Flora C. R., 2001). By building on local and scientific knowledge, healthy ecosystems may be developed with multiple community benefits, where human communities act in concert with natural systems, rather than simply to dominate these systems for short term gain.

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Cultural capital reflects the way people “know the world” and how to act within it as well as their traditions and language. It includes cosmovisión (spirituality, and how the different parts are connected), ways of knowing, food and language, ways of being, and definition of what can be changed. Cultural capital influences what voices are heard and listened to, which voices have influence in what areas, and how creativity, innovation, and influence emerge and are nurtured. Monitoring the condition of community capitals allows excluded groups to effectively engage with the cultural capital of dominant groups. Cultural differences are recognized and valued, and ancestral customs and languages are maintained.

Human capital includes the skills and abilities of people to develop and enhance their resources, and to access outside resources and bodies of knowledge in order to increase their understanding, identify promising practices, and to access data to enhance community capitals. Formal and informal educations are investments in human capital (Becker, 1964; Schultz, 1961). Human capital also includes health and leadership. The different aspects of human capital are important to acknowledge.

Developing human capital includes identifying the motivations and abilities of each individual to improve community capitals, increase the skills and health of individuals to improve community capitals, and recombine the skills and motivation of the community to move to a more sustainable collective future.

Social capital reflects the connections among people and organizations or the social glue to make things, positive or negative, happen (Coleman, 1988). It includes mutual trust, reciprocity, groups, collective identity, sense of a shared future, and working together (Putnam, 1993b). It is extremely important for creating a healthy ecosystem and a vital economy.

Bonding social capital refers to those close ties that build community cohesion. Bridging social capital involves loose ties that bridge among organizations and communities (Nayaran, 1999). A specific configuration of social capital – entrepreneurial social capital (ESI) is related to community economic development (*Flora C. a., "Entrepreneurial Social Infrastructure: A Necessary Ingredient, " 1993). ESI includes inclusive internal and external networks, local mobilization of resources, and willingness to consider alternative ways of reaching goals.

Political/Civic capital reflects access to power, organizations, connection to resources and power brokers (*Flora C. a., Rural Communities: Legacy and Change, 3rd edition, 2008). Political capital is the ability of a group to influence standards, regulations and enforcement of those regulations that determine the distribution of resources and the ways they are used. When a community has high political capital, its people have the collective ability to find their own voice and to engage in actions that contribute to the well being of their community.

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Indicators of political/civic capital include organized groups work together, local people know and feel comfortable around powerful people, including scientists and government functionaries, and local concerns are part of the agenda.

Financial capital refers to the public and private financial resources available to invest in community capacity building, to underwrite businesses development, to support civic and social entrepreneurship, and to accumulate wealth for future community development. Financial capital also refers to personal financial resources available for families to buy goods and services, invest in business opportunities, support the community tax base, and save for emergencies and retirement. Money that is spent for consumption is not financial capital. Money that is put aside and not invested is also not yet financial capital. It must be invested to create new resources to become capital.

Financial capital includes remittances savings (particularly by increasing efficiency through better management, credit more skilled workers, use of technology and better regulations), income generation and business earnings (by increasing human capital through skills and social capital through more integrated value chains), payment for environmental services, loans and credit, investments, taxes, tax exemptions user fees, and gifts/philanthropy. Often rural communities are viewed as bereft of financial capital, but, particularly with increasing globalization of the labor force, out-migrants can be even better organized to invest in their communities in a way that is cumulative for rural development.

Built capital includes the infrastructure that supports the other capitals. It includes such diverse human-made objects and systems such as sewers, water systems, electronic communication, soccer fields and processing such plants. And it includes the kinds of scientific equipment needed for the identification and eradication of invasive species.

Epilog

CSREES through collaboration with Land-Grant University partners seeks to better prepare local citizens to meet challenges, make informed decisions, increase opportunities, and improve rural communities. Research, education and extension activities funded by CSREES and managed by NPLs increase the possibility that Americans will learn new knowledge, skills, and abilities to improve their own lives and the communities in which they live.

A portfolio dedicated to improving quality of life in rural areas has wide application in all aspects of CSREES programs in research, education, and extension. Programs sustain and improve human, social, civic, natural, cultural, financial, and built capital in communities. Model programs in this portfolio focus on investments in new knowledge to understand how people can improve their well-being and quality of life while functioning in a family, community, regional, national, and global context.

Portfolio's Linkage to CSREES Strategic Plan

CSREES Goal(s) Supported:

This portfolio supports research, education, and extension program efforts to expand economic opportunities and improve the quality of life in rural America. This portfolio is linked to CSREES Strategic Goal number three: *Support Increased Economic Opportunities and Improved Quality of Life in Rural America*. Strategic goal number three supports economic opportunities and quality of life enjoyed by residents and businesses in communities, and depends to a large extent on the capacity to take full advantage of resources available in changing circumstances. CSREES supports the education and training of residents and community and business leaders to help their communities thrive in the global economy. Education programs strengthen the foundation for this goal by building capacity in the agricultural research and extension system and training the next generation of scientists and educators.

CSREES Objective(s) Supported:

3.1: Expand economic opportunities to rural America by providing research, education and extension programs to create opportunities for growth.

This portfolio supports this objective through the generation, dissemination, and use of research-based information and knowledge that creates new and innovative economic opportunities for communities and assists public and private sector leaders in their decision making of rural issues.

3.2: Provide Research, Education, and Extension to Improve the Quality of Life in Rural Areas.

This portfolio supports this objective through CSREES sponsored research, education, and extension programs that improve the understanding of socioeconomic conditions in rural America, and promote community, youth and family well-being.

CSREES Strategic Plan Key Long-Term Outcomes

The key outcomes, long term performance measures and performance criteria to support strategic objective 3.1 follow in the table below. These objectives, key long-term outcomes, performance measures and criteria and actionable strategies, are taken from the CSREES Strategic Plan for 2007-2012.

The performance measure in this Portfolio for objective 3.1 which relates only to the SARE program was established in 2005 with the concurrence of Office of Management and Budget (OMB). However, due to the restructuring of some of the CSREES Portfolios the SARE program is a secondary KA in this Portfolio. It is reported as a primary KA in the other Portfolios. Many of the KAs in this Portfolio contribute to

Objective 3.1 and could be included in this performance measure. However, it is not feasible to pursue the clearances needed to modify this measure for the 2009 revision.

Key Long-Term Outcome: Expanded economic opportunities in rural America and increased knowledge pertaining to economic diversification, community planning, service infrastructure, local government, youth/adult workforce planning, and civic engagement through innovative integrated research and extension projects targeted to regional business, economic and business development.

Performance Measure: The number of farmers and ranchers that gained an economic, environmental or quality-of-life benefit from a change in practice learned by participating in a SARE project.

Performance Criteria (Objective 3.1):

- Improve management of physical resources and socioeconomic relationships for recreation;
- Develop and improve management and administrative techniques applied to farming, agricultural business and other businesses and enterprises to enhance planning, decision making, and resource use;
- Increase knowledge and understanding about community needs and preferences to develop information, skills, and decision-making tools to help community leaders, organizations, and rural enterprises understand problems, identify opportunities, and plan for renewal and growth;
- Develop economic theory and methodology to assist government, public and private entities and individuals to improve their knowledge base and decision-making capacity;
- Increase understanding of the technological, demographic and social changes occurring in society and ways in which individuals, families and communities cope with sociological and technological change;
- Enhance and improve program and project design, experimental design, surveys, sampling, and statistical analysis;
- Increase the efficiency and effectiveness of research, education and extension methods, management and proposals; and
- Develop, implement and improve educational processes, needs and methods to achieve educational goals, use and assessment of communication, information delivery, and technology transfer methods and systems.

Actionable Strategies (Objective 3.1):

- Sponsor analysis of policy and translate research results into recommendations for business management and community leadership to optimize public and private decision-making;
- Sponsor education, research, and extension on economic diversification, e-commerce, entrepreneurship, community planning, service infrastructure, local government, workforce development, leadership development and civic engagement;
- Support application of geographic information systems and other information technologies for problem solving and strategies for local community and socioeconomic development;
- Sponsor research and analyses on the structure and performance of rural economies and on

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services and resources that promote economic development;

- Support the recruitment, retention, training, graduation, and placement of the next generation of research scientists, educators, and practitioners in the food and agricultural sciences;
- Sponsor education to public and private decision makers that facilitate greater understanding of the policies and programs that promote economic opportunities and improve quality of life; and
- In cooperation with the Rural Development mission area, support technology transfer information available to individuals and businesses.

The key outcomes, long term performance measures and performance criteria to support strategic objective 3.2 follow in the table below. These objectives, key long-term outcomes, performance measures and criteria and actionable strategies, are taken from the CSREES Strategic Plan for 2007-2012.

Key Long-Term Outcome: Increased knowledge among county based staff and community leadership in order to provide research-based practices to encourage appropriate community capital development (see Appendix G) which enhances business and economic development, the availability of appropriate education and health services, transportation networks and vibrant community connections. Electronic deployment of information to increase the capital available for more nimble and creative community responses to needs.

Performance Measure: The percentage of Cooperative Extension Educators trained and using evidence-based (see Appendix H) programming based on seven community capitals to facilitate informed decisions that improve quality of life and increase economic viability.

Performance Criteria (Objective 3.2):

- Improve insight and understanding into the demands, preferences, behavioral responses and needs of individuals and consumers;
- Develop, evaluate, and disseminate methods and strategies, including screening, immunization, and preventive care to enhance health-related practices;
- Improve understanding of how individuals and families obtain and use resources of time, money and human capital to achieve their standard of living and quality of life;
- Increase understanding and development of the social, cognitive, emotional and physical capacity of children, youth, and adults throughout the life cycle;
- Increase knowledge and understanding about the agricultural products used in apparel and textiles, and on factors that affect consumer choice and the interface between producers, retailers and consumers;
- Improve the development, quality and functioning of community institutions and social services; and
- Promote positive youth development.

Actionable Strategies (Objective 3.2):

- Sponsor research-based information on community assets and liabilities that affect youth, family, and community well-being;
- Sponsor research on policies and programs addressing circumstances that impact the well-being of individuals, family and communities;
- Support the recruitment, retention, training, graduation, and placement of the next generation of research scientists, educators, and practitioners in the food and agricultural sciences;
- Sponsor education, research, and extension to support effective family decision-making in managing their social and economic capital;
- Sponsor regional rural development training, research and information access;
- Sponsor analysis and education on issues that impact the well-being of communities and families, characterized people and places in need of assistance, and the effectiveness of related public policies and programs; and
- Sponsor education and extension to help parents provide a safe, healthy and nurturing atmosphere in which children and youth can grow and learn.

Performance Measures Progress Table

Performance Measure Description: Percentage of Cooperative Extension Educators trained and using evidence – based programming in rural communities to facilitate informed decisions that increase economic opportunities and improve quality of life.		
Explanation of Measure: Improvements in the delivery of extension does not in itself ensure improvements in the economic opportunities and the quality of life in rural America. There are intervening factors that are beyond the scope of extension. Therefore, the use of an output measure in this instance is appropriate. CSREES builds capacity of intermediaries, such as Extension Educators, to bring evidence-based programs to communities, families, and individuals. The appropriate measure for this work is educator/intermediary behavior change. This measure indicates an increase in the percentage of Cooperative Extension Educators trained and using national or regional multi-state evidence-based programs and activities (e.g. 4-H Youth Development; Family Strengthening; Community Development; Health Education; Housing & Indoor Environments; Resource Management; Sustainable Agriculture Research Education {SARE}-Professional Development) to enable rural people and communities to improve economic opportunity and quality of life.		
Baseline (FY 2005): 75%	Target	Actual
FY 2006	77%	77%
FY 2007	79%	89%*
FY 2008	81%	91%
FY 2009	83%	Available July 2010
FY 2010	85%	Available July 2011

* A slight increase in the percentage of Extension Educators who received training on one or more programs offered through the CSREES Financial Security Program accounts for the increase in this measure as follows: An estimated 1,400 Extension educators and farm management experts who deliver personal finance and related educational programs received training on one or more programs offered through the CSREES Financial Security Program. This number is aggregated from face-to-face events, such as training on the NEFE® High School Financial Planning Program, America Saves Week, and Cooperative Extension’s new Internet-based delivery format available at www.extension.org/personal_finance and indirect methods through webinars and monthly electronic communications. Based on program accomplishment reports, it is estimated 90 percent of these educators in 48 States, the District of Columbia, and one U.S. territory implemented one or more evidence-based programs in rural communities.

The table below shows the different programs that make up the average used in the above Performance Measures Progress Table.

Extension Measure--Weighted Average 2008					
Program	% Using		# Trained	Weights	Weighted %
4-H After School	100.0%	[1]	2,902	0.321662	32.2%
Healthy Indoor Air	80.0%	[2]	2,500	0.233427	18.7%
Financial Security Program	90.0%	[3]	1,400	0.129605	11.7%
SARE	76.0%	[4]	4,000	0.373483	28.4%
			10,802		90.9%

Portfolio Inputs

Portfolio Level Funding Table and Bar Chart

Table 1a displays Agency portfolio funding that is reported in the Current Research Information System (CRIS) and Plan of Work – Annual Report (POW-AR). Agency extension (Smith-Lever 3(b) & (c) and 1890 Extension) funding data were first captured in FY 2007, previous year data aren’t available. Non-Agency funding, any funding provided outside of CSREES, are reported in CRIS. Individual knowledge area (KA) funding charts are found in appendices B and C.

Table 1a: Community Sustainability and Quality of Life Portfolio Summary Funding Table Combined Research and Extension Funding in Actual Dollars						
Funding Sources	(\$ in the Thousands)					Grand Total
	FY 2003	FY 2004	FY 2005	FY 2006	FY 2007	
Agency Formula Expenditures	4,106	3,920	3,761	4,544	116,462	132,793
Agency Grant Obligations	2,316	1,312	6,678	9,024	29,777	49,107
All non-Agency Funding	42,315	45,326	53,733	89,147	125,720	356,241
Total Funding	48,737	50,558	64,172	102,715	271,959	538,141
Percentage of CSREES Funding	13%	10%	16%	13%	54%	34%

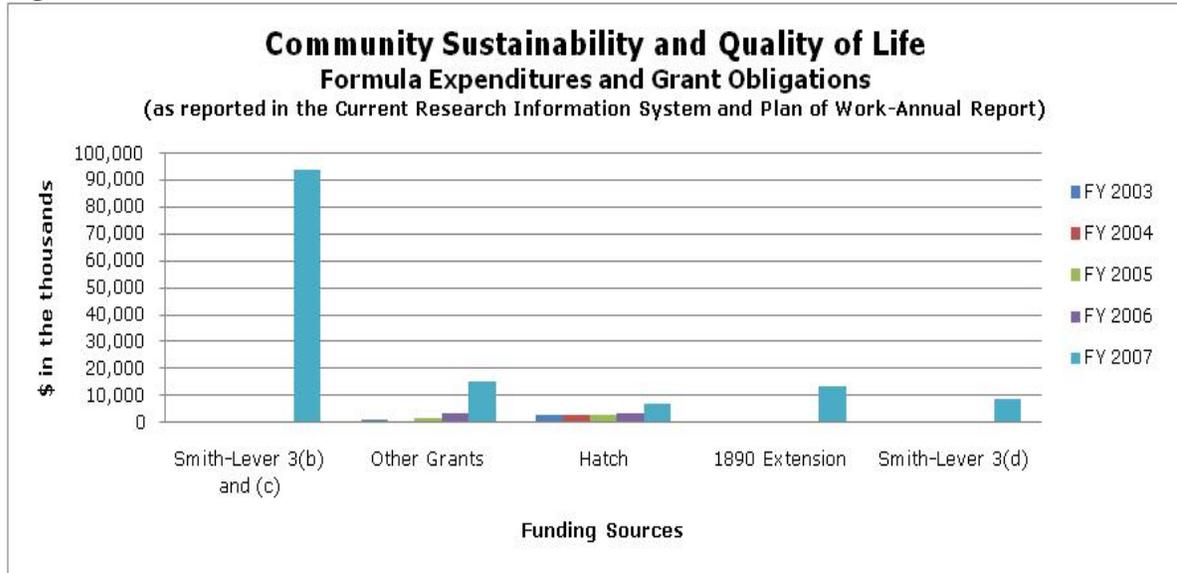
Table 1b: Quality of Life Portfolio Summary Funding Table Combined Research and Extension Funding in Constant Dollars Calculations Based on 2007						
Funding Sources	(\$ in the Thousands)					Grand Total
	FY 2003	FY 2004	FY 2005	FY 2006	FY 2007	
Agency Formula Expenditures	4,627	4,303	3,993	4,673	116,462	134,058
Agency Grant Obligations	2,610	1,440	7,090	9,281	29,777	50,198
All non-Agency Funding	47,683	49,751	57,046	91,686	126,857	373,024
Total Funding	54,920	55,494	68,129	105,641	273,096	557,279

Table 1b shows portfolio level funding in constant dollars. These figures were configured to show changes in funding while controlling for inflation using the Consumer Price Index (CPI) calculator, which is located at <http://data.bls.gov/cgi-bin/cpicalc.pl>. For accurate calculations, the inflation calculator uses the average Consumer Price Index for a selected calendar year. This data represents changes in prices of all goods and services purchased for consumption by urban households. Table 1b’s figures were calculated using 2007 as the base comparative year.

Changes in funding from FY05 to FY06 include a slight decrease in Hatch and SBIR funding, and increases in Evans Allen, special grants, NRI funding, and a large increase in grants classified as “other.” The increase in special grants funding is related to the Rural Health and Food Safety Education Program. The increase in NRI funding stems from the inclusion of quality of life-related topics in the NRI Human Nutrition and

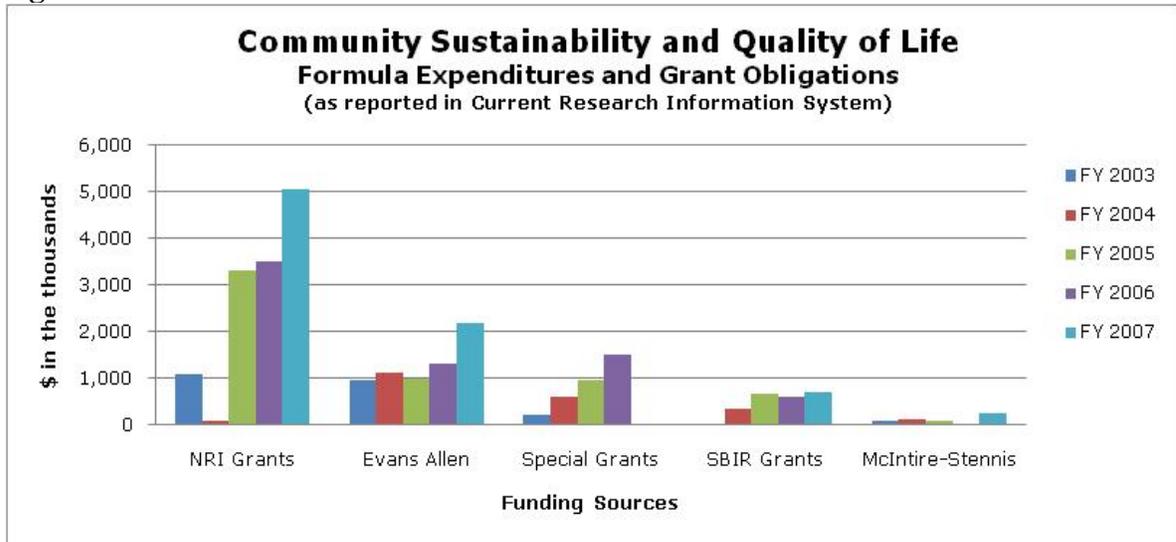
Obesity Program. In 2007 HATCH received an increase in funds, at the same time earmarks were not funded (see Figure 1).

Figure 1



Figures 1 and 2 display portfolio level formula expenditures and grant obligations that are reported in the Current Research Information System (CRIS) and in the Plan of Work-Annual Report (POW-AR). The Smith-Lever 3(b) & (c) and 1890 Extension formula expenditures were first reported in the POW-AR in 2007, while the remaining funding sources in figure 1 are reported in CRIS. As illustrated in Figure 1, Smith-Lever 3(b) & (c) has provided 64% of FY 2007’s Agency funding (over \$93.4M). Smith-Lever 3(d) grant obligations were reported through the “Other CSREES” funding category during FY 2003-2006, starting in FY 2007 these obligated dollars are reported separately. There is a significant increase in 2007 funding for “Other Grants” category because an increased number of grant programs started reporting dollars and activities in the Current Research Information System (CRIS) in 2007. See Appendix B for funding source definitions.

Figure 2



Formula expenditures and grant obligations reported in Figure 2 are reported in CRIS. McIntire-Stennis expenditures for fiscal years 2003 – 2007 total \$535,000. National Research Initiative, which obligated a total of \$2.6M for fiscal years 2003 – 2007, was not reauthorized in the Food, Conservation, and Energy Act of 2008, but the Agriculture and Food Research Initiative (AFRI) Competitive Grants Program was authorized in 2009 in place of the NRI. This funding chart identified NRI obligated dollars because dollars received were under this funding category during the reporting timeframe. Information regarding the AFRI program may be found on the Agency’s website at http://www.csrees.usda.gov/funding/afri/afri_synopsis.html.

Figure 3

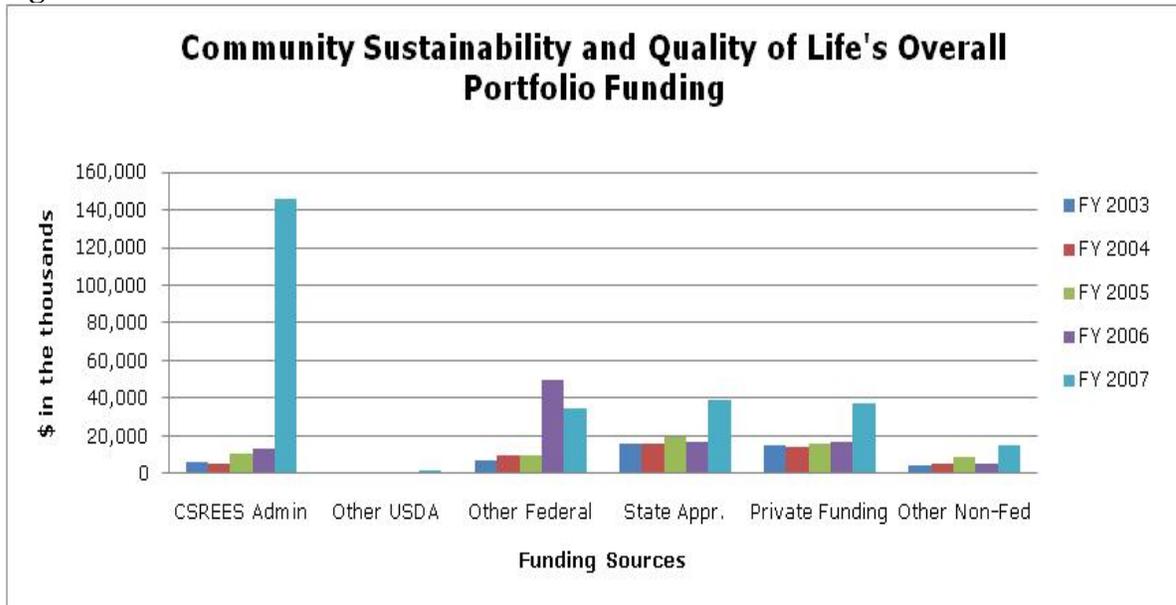
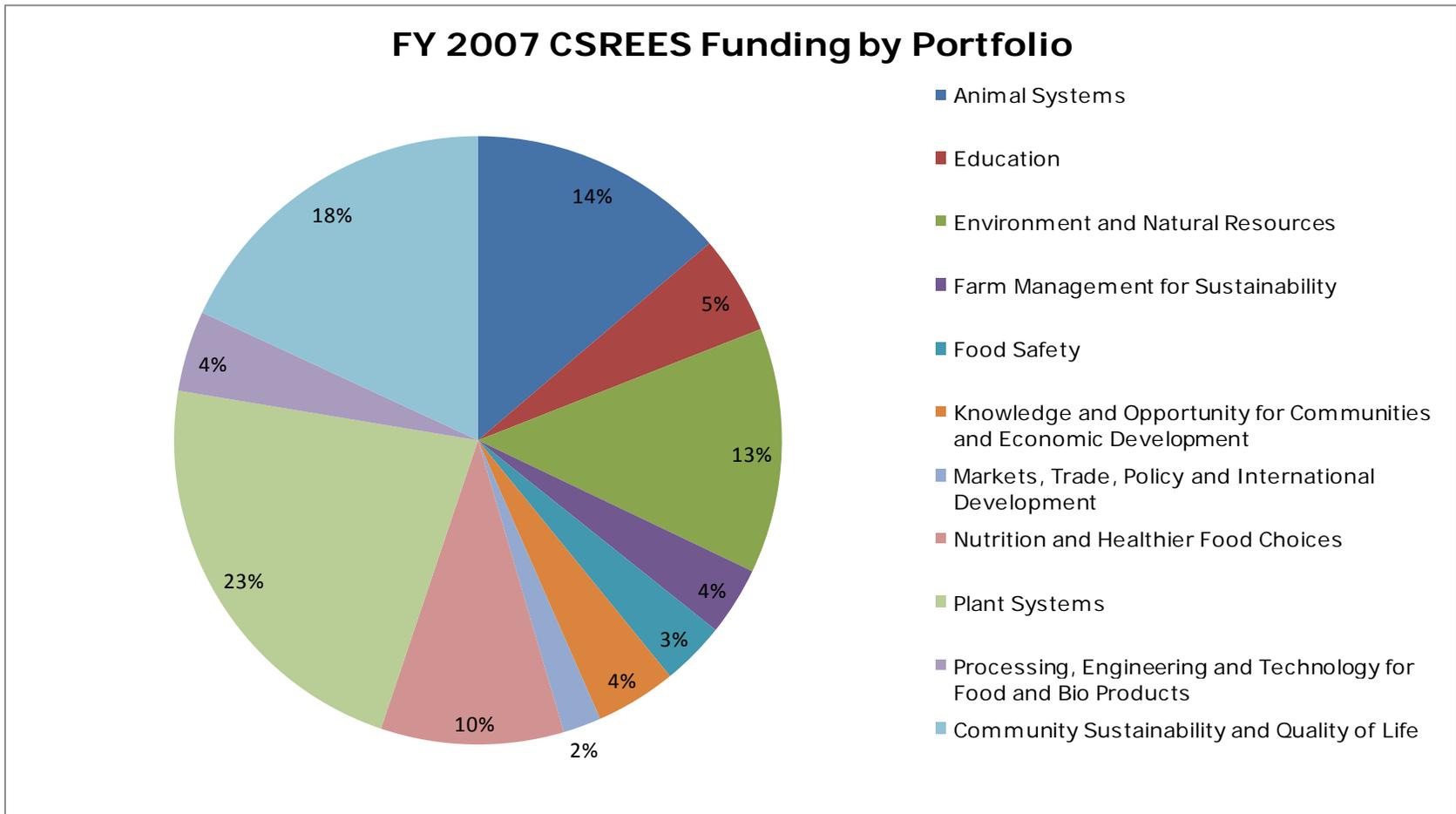


Figure 3 displays the portfolio’s overall funding, which includes funding from other USDA agencies, other federal agencies, from the state, and other non-federal funding sources. The large increase in CSREES Administration funds in FY 2007 is due to Smith-Lever 3(b) & (c) and 1890 Extension dollars that were not reported in the state Plans of Work before fiscal year 2007. Specific documentation of these resources is found within each KA section. Definitions for these funding sources are located in Appendix B.

In addition to the CSQoL portfolio, the agency has 10 other portfolios. Figure 4 shows the comparison of expenditures by portfolio. It is interesting to note that the CSQoL Portfolio is the second highest funded portfolio in the agency, exceeded only by Plant Systems. CSQoL funding represents a little over 20% of the agency budget, while Plant Systems represent about 24%.

Figure 4



Portfolio Results

Portfolio Outcomes

Human Capital - Smith Lever 3(b) and (c)

In 2006-2007 the “Small Steps are Easier Together” intervention for weight gain prevention in rural worksites in New York exceeded project goals for dietary and physical activity changes. On average 40% of the participants reported dietary changes. Of these, 36 % met the intervention goal and reported drinking less sweetened beverages, but drinking more water and eating smaller portions and healthier foods; 46% reported calories savings of 100 calories/day over seven or more weeks. In addition, the proportion of participants who met the walking goal to increase steps by 2000 or more over baseline increased from 45 % to 65 % during the intervention.

Financial Capital - Smith Lever 3(b) and (c)

In preparation for 2008 “America Saves Week,” Cooperative Extension in 24 States built community-based partnerships with 1,325 organizations, many of which were financial institutions willing to offer low-deposit savings accounts to first-time America Savers. During the week, February 24-March 2, 2008, over 7.7 million “you can build wealth, not debt” messages were delivered in 24 states via indirect methods such as media, Internet and exhibits. An additional 97,372 Americas were reached through direct methods such as workshops. As a result, almost 5,600 youth and adults in 24 States opened over 4,900 new accounts pledging to save a total of almost \$749,000 monthly. Previous research indicates 80% of participants increased knowledge and 78% increased confidence with managing money.

Social Capital - Smith Lever 3(b) and (c)

Basic skills, socialization, and educational motivation are first taught in the home. Many youth, however, are growing up in environments that lack parental supervision and support, and lack quality time to build trusting relationships. Because of these circumstances, youth may suffer from anti-social behavior such as gang participation, crime, disruptive school behavior, school drop-out, and drug and alcohol addiction. North Carolina Family and Consumer Science agents are assisting in building strong families by educating citizens on parenting and family life issues. Agents conduct camps, workshops, trainings, and conferences that help address the very real and important needs of parents. These educational efforts emphasize the importance of quality family time and encourage skill development for parents.

As a result of participating in educational programs, 3,928 parents attended parenting education classes, including 3,039 limited-resource persons and 920 court-mandated or DSS-referred parents. As a result of these classes, 1,810 reported adopting effective

parenting practices, 2,449 adopting practices in motivating and guiding children, and 2,095 parents said they adopted practices in nurturing their children.

Natural Capital—*Small Business Innovation Research (SBIR)*

The United States is fortunate to contain miles of hiking, walking, and biking trails that improve the quality of life for rural and urban communities across the country. Unfortunately, managing and monitoring these trails can be time consuming and, at times, cost prohibitive. Scientists in Nevada have developed new technology to ensure outdoor recreation and trail routes are more efficiently maintained and accessible to all individuals. The Wheeled Instrumentation Sensor Package (WISP) and High Efficiency Trail Assessment Process (HETAP) Software system package is an automated system that allows for rapid and objective collection of trail data following the Universal Trail Assessment Process (UTAP). The ongoing availability of objective trail data using HETAP will continue to enhance the availability of trail access information for users and trail managers.

Civic Capital—*Hatch Funding (CRIS #0196860)*

The University of Illinois Extension Service developed the “Youth as Resources” project to promote rural socio-economic revitalization and rural youth retention, by educating and engaging rural youth in leadership and entrepreneurial roles that capitalize both on their interests and abilities, meet the community's specific needs, and use and develop existing community assets.

Through a community-wide collaborative effort students mapped their communities and created a resource directory. Students learned communication and interviewing skills necessary for approaching business owners and agency directors. They administered surveys and conducted interviews. Business owners and agency directors completed surveys detailing how their organizations are designed to meet youth needs.

Individual interviews were conducted with each student who participated in the mapping. Students reported discovering more opportunities available for teens in their hometowns than they had known about before the project began. Many commented that this experience helped them see how they could live and work in their community as an adult. Youth reported that most community leaders and business owners viewed their project favorably. Two students were offered jobs, as their interviewees were impressed by their interviewing skills, professionalism, and poise. Several businesses and organizations were stimulated to promote or create new opportunities for teens. For example, an opportunity to job shadow members of the police department resulted from the students' interviews with their local police department.

Cultural Capital—*Smith Lever 3 (b) & (c); Programs of Distinction Data Base*

The “Attitudes for Success” Youth Leadership Program in Umatilla County, Oregon, was developed to provide opportunities for Hispanic youth to develop life skills and to be

involved in their communities. As 30% of Hispanic high school students drop out of school in the Umatilla/Morrow Education Service District, the program provides information about community leadership and college opportunities. The program includes an annual daylong leadership/college preparation conference, and a youth leadership board providing intensive leadership opportunities on a monthly basis. Oregon State University reports that five communities created school-based multi-cultural leadership clubs to enhance diversity, and former graduates who've attended college have returned to speak to the students about the impact of the program and the importance of college. Schools provide student release time, busing, and faculty support so that youth may participate in the program. Of the more than 4,300 Hispanic youth who have participated, 86% reported the program helped them gain leadership skills, and 95 percent indicated their involvement increased their likelihood to attend college.

Built Capital--Small Business Innovation Research (SBIR)

The focus of the project, "Research and Development to Improve Rural Mental Health Care," was to improve the efficiency and quality of mental health services in underserved, geographically dispersed rural areas communities. IconoPsych Care, LLC explored the technical feasibility associated with producing and marketing high-quality mental health delivery software and tele-portal based communications technologies. Considered were the creation of electronic software system to facilitate improved communication between mental health care practitioners and patients; the development of a software system that increases efficiency and quality-of-care compared with current paper-based record-system; and the creation of a tele-portal based health care delivery hardware that facilitates long-distance care.

As a result of this project, software to deliver web-based telepsychiatry services integrated with mental health-specific electronic medical recordkeeping has been developed and tested; a collaboration with the U.S. military was established to provide distance mental health care to the enlisted population; and 13 mental health service providers are interested in being test sites for the IconoPsych product suite.

Portfolio Leadership and Management

Stakeholder Assessment

To strive for excellence in research, education and extension programs in quality of life-related work, and to realize new directions, CSREES works closely with stakeholders interested in the myriad issues impacting citizens and communities. Both formal and informal procedures are used to obtain stakeholder input. These may include stakeholder workshops, symposia, technical reviews, peer panel recommendations, presidential directives, interagency agreements, and strategic plans for education programs. CSREES and its educational partners conduct stakeholder listening sessions in order to assess program effectiveness and directions and to identify new and emerging issues.

Prioritizing Stakeholder Input and Allocation

CSREES has made painstaking efforts to develop mechanisms for soliciting and implementing input from stakeholders at all levels. As leaders in the field, NPLs with responsibility in the quality of life in rural areas portfolio carefully review stakeholder input and make strategic priority decisions. These efforts help ensure that stakeholders appreciate their value in the partnership. A few examples are cited below to highlight the process:

- NPLs develop and participate in a wide variety of professional opportunities for partners to dialogue about current and emerging issues related to this portfolio. Feedback from partners, both internal and external is incorporated into NPL planning.
- In 2006 CSREES deployed a program that linked specific National Program Leaders (NPLs) with one or two universities. The assigned NPLs review the POW and Accomplishment Reports of their assigned universities, and connect university staff to appropriate agency representatives for a variety of questions and support. Since the inception of the NPL Liaison Program, NPLs are in continuous contact with their assigned state land-grant universities, dialoguing with administrators, faculty and staff to assess climate and gauge stakeholder challenges and opportunities. Multiple liaison site visits have been conducted through this program over the past year and best practices and processes are shared among NPLs to strengthen the CSREES/LGU relationship.
- At the programmatic level, NPLs continuously interact with partnership colleagues, external partners, professional organizations, and each other to assess and integrate stakeholder input into their programs.
- CSREES also recognizes its role as a conduit of current research information. CSREES works closely with other agencies, organizations and land-grant universities and provides a mechanism to distribute information to stakeholders and partners. Outlets include multiple CSREES listservs, dedicated web pages, newsletters, teleconferences, trainings and conferences, all facilitated, monitored and moderated by NPLs managing them.

Approaches to Addressing Issues Related to Focus

Coordination is ensured by active participation in intra-and inter-departmental coordinating committees. In addition, CSREES continuously works to integrate research, education and extension activities. For example, as a result of the Financial Literacy and Education Improvement Act, part of the Fair and Accurate Credit Transactions (FACT) Act of 2003, CSREES is one of 20 federal agencies seated to the Financial Literacy and Education Commission. The Commission coordinates financial education efforts throughout the federal government working with other organizations including the Land-Grant University and Cooperative Extension Systems.

National Program Leaders leading CSREES' competitively funded grants work with their CSREES colleagues to find and recommend faculty from the LGU that have knowledge and expertise in specific areas to serve on review panels. This provides a more accurate

review of proposals and provides professional development for the faculty members at the LGU.

Providing Guidance to Partners/Grantees

Guidance is provided to university partners and grantees in a variety of ways. They include, but are not limited to, the following:

- National Program Leaders (NPLs) serve as agency liaisons to assigned universities. One of the primary NPL functions is to review the university's Annual Plan of Work and Accomplishment Report. NPLs provide feedback for strengthening the documents and significant modifications, if needed, in order to approve formula grant funding.
- A variety of workshops (face-to-face, internet based) are conducted by CSREES staff in areas such as grant writing and plan of work and accomplishment report writing. Information on these opportunities is disseminated widely through a variety of list serves maintained by the NPLs. A variety of NPLs participate in the trainings.
- NPLs provide individual consultation to individuals, faculty, and staff at universities to improve program delivery, evaluation and reporting.
- University faculty and other individuals are given opportunities to serve on peer panels that review proposals. Through this process they learn about different agency programs and the elements in successful proposals.
- The agency maintains a web-site that has a great deal of relevant information to guide potential grantees in the grants that are available and how to apply for them. NPLs maintain the content of the web-site.
- NPLs connect university faculty to a wide array of resources from other federal agencies and not-for-profit organizations through regular conference calls, webinars, e-mails, etc.
- The programs articulated in this Portfolio currently have at least one NPL and/or one Program Specialist that is providing national leadership in the area. When vacancies occur, efforts are made to replace staff in the KA areas.
- NPLs coordinate the development of the RFA's, review process and award of money to successful grant applicants. Often feedback is provided to applicants to improve their changes of successful applications in the future.

Post-Award Review Process

A post-award review process is in place for both formula grant funded and competitively funded research and integrated projects. Most projects are required to submit annual progress reports to CSREES' electronic Current Research Information System (CRIS). Progress reports are reviewed by National Program Leaders who are encouraged to contact the principal investigator if the report does not contain sufficient substance and request a revised report. In addition, the Rural Health and Safety Education Competitive Grants Program requires quarterly reports on project progress, challenges and successes. An award to establish a Personal Financial Assessment System (PFAS) for all military enlistees and their supervisors, funded by the U.S. Department of Defense through CSREES, is monitored on a monthly basis.

Programmatic or Management Shortcomings

Prior to 2007, CSREES had limited technological capacity to extract usable data from a number of planning and reporting systems such as Plans of Work (POW), Accomplishment Reports, and the Current Research Information System (CRIS). This limited capacity compromised the ability to both extract and analyze the rich fiscal and programmatic information submitted by state land-grant universities.

The CSREES Leadership Management Dashboard (LMD) was deployed in 2008. Some of the 2007 data (the first year information was available through the LMD) in this report was extracted from the LMD system. This electronic system allows National Program Leaders (NPLs) and other agency staff to quickly:

- review project status of grants awarded to research, education, and extension communities,
- calculate, analyze and compare fiscal data and deployment of staff,
- Find examples of quality programs, and
- Several other types of information

The Research, Education and Economics Information System (REEIS) provides valuable state reports and documents related to POW's and Accomplishment Reports.

Although much progress has been made, systems still need to be refined so that CSREES staff can more easily search and find examples of quality program outcomes based on any given set of variables.

The Office of Planning and Accountability has made significant progress to extract outcomes from the newly submitted plans of work based on the electronic format. Some of the preliminary outcomes gleaned from those reports appear to provide good data that feed into the annual reports. Additional efforts are underway to streamline the process.

Key Future Activities and Changes in Direction

Through a variety of avenues, partnership colleagues and other partners have been encouraged to identify emerging trends and challenges facing rural families. Among the top issues identified in 2008:

- Early Childhood, Childcare
- Youth Development; After-school Programs
- Aging, Caregiving
- Health, Obesity
- Debt, Poverty
- Immigration, Culture
- Rural Health
- Science, Engineering, & Technology and Workforce Skills for the 21st Century
- Impact of New Agricultural Technology on Human Behavior
- Citizenship and Leadership

- Managing in Money Tough Times

The system struggles to keep pace with the growing demand for educational resources, research, partnerships, and support necessary to meet quality of life challenges. Demand for high quality research and educational outreach continues to grow. The **eXtension Initiative** is proving to be an ideal vehicle for professionals engaged in efforts related to the CSREES CSQoL Portfolio. Where resources and gaps exist, partnership colleagues are embracing the opportunity to share the best QoL-related resources available to meet critical and emerging human and community needs. **eXtension**, www.extension.org, provides Internet visitors with reliable, up-to-date information on a variety of topics. It is a platform where Extension Educators from over 70 universities in the land-grant university partnership gather to develop and disseminate new information and resources.

For example, the **eXtension** family caregiving resource www.extension.org/family+caregiving provides knowledge and information for any adult providing care for someone older than 18 who is frail, disabled or unable to care for themselves. The information is divided into eight content areas: caregiving and disasters, employed caregivers, financial management, health, housing, nutrition, relationships and psychosocial well-being, and rural family caregiving. Materials include research-based, peer-reviewed articles, fact sheets, learning activities, linkages, and answers to commonly asked questions. The site complements the work of Cooperative Extension System Educators in more than 3,000 counties throughout the United States and is customized with links to local extension sites.

Another eXtension QoL-related site is www.extension.org/personal+finance. This site—which has received prestigious awards from two professional associations—offers interactive learning lessons and personal finance decision-making tools, more than 1,400 frequently asked questions, chats and webinars, and an ask-the-expert function. The site has obtained nearly \$500,000 in external funding since its official launch in February 2008. In late 2008, a “Managing Money in Tough Times” component was added. Between March 2008 and 2009 the site received more than 1.2 M page views.

What are Others Doing

Recognizing that improving quality of life for people and communities takes a major coordination of resources, federal and national agencies and organizations are strategically collaborating to maximize limited resources and reduce duplicative efforts.

For example:

Helping America's Youth-The challenges facing youth have captured the attention of the nation. In response to this concern, a White House initiative on Helping America's Youth (HAY) was led by First Lady Laura Bush in 2007 - 2008. The initiative was designed to raise awareness about the challenges facing youth and to motivate caring adults to connect with youth in three areas—family, school, and community. The *Community Guide Working Group* developed several on-line tools including a guide to

forming community partnerships; *MapIt*, a tool to map community, state, and federal resources; and a Program Tool that allows users to search for evidence-based programs. In addition, land-grant universities nominated community partnerships of youth and adults that were invited to participate in one of five regional HAY conferences held around the country.

Federal Interagency Working Group on Child Abuse and Neglect Prevention-Child abuse and neglect is a problem that has many facets, and the Federal Interagency Work Group on Child Abuse and Neglect Prevention was created to provide a forum for collaboration among federal agencies with an interest in child maltreatment. Responsibilities include sharing information, planning and implementing joint activities, making policy and programmatic recommendations, and working toward establishing complementary agendas in the areas of training, research, legislation, information dissemination, and delivery of services as they relate to the prevention, intervention, and treatment of child abuse and neglect. During FY 2007, the group has promoted a series of webinars on best practices in child abuse prevention with participation exceeding 1000 professionals in the field.

Family Strengthening Peer Network-The group is comprised of professionals representing over 70 organizations in service provider, research, and policy analysis fields sharing and developing knowledge in family strengthening strategies and approaches. The group helped disseminate the *Family Strengthening Writ Large On Becoming a Nation that Promotes Strong Families and Successful Youth* to promote changes that would strengthen family relationships and financial stability. The CSREES National Program Leader-Family Science, co-chairs the group to facilitate the coordination of federal and national efforts in family strengthening.

Federal Interagency Working Group on Older American Indians-A mandate of the Older Americans Act, the FITFOAI represents departments and agencies of the federal government with an interest in older Indians and their welfare. The working group shares information and resources to improve coordination of programs and services; increases access to and availability of programs and services; simplifies and streamlines community systems for delivering programs and services; and assists Tribes as they plan, implement, and administer programs and services for the benefit of older Indians.

President's New Freedom Initiative on Mental Health-The mission of the committee is to study the United States mental health service delivery system, including both the private and public sector providers and advise the President on methods to improve the system so that adults with serious mental illness and children with serious emotional disturbances can live, work, learn, and participate fully in their communities. The committee identified policies that federal, state and local governments could implement to maximize the utility of existing resources, improve coordination of treatments and services, and promote successful community integration for adults and children with a serious emotional disturbance. Subgroups with CSREES NPL and Program Specialist participation and leadership include:

- *Caregiving Subcommittee*- provides awareness of the range of programs and services of federal agencies that support caregivers across the lifespan. The subcommittee has coordinated a satellite broadcast series on a variety of issues related to caregiving (including presentations by CSREES NPLs)-providing professional development opportunities to service providers across the nation as well as educational and informational opportunities to caregivers and their families.
- *Working Group on Reintegration of Returning Veterans and Their Families*-is in the development stage and will work to create meaningful engagement among federal agencies addressing the issues and actions that enhance and facilitate an effective support system to meet the unique needs of military families.

Healthy Homes and Rural Housing-The Housing and Environment program is working with HUD and the Office of Lead Hazards Control and Healthy Housing as a funded grantee under their Healthy Homes program to provide outreach through land-grant partners. The group is working with USDA's Rural Housing Service to offer homebuyer education for first-time homebuyers, with the Department of Homeland Security, FEMA, and the Southern Regional Rural Development Center to obtain field assessments of disaster awareness and the state of emergency preparedness among disadvantaged households, and with research data from the University of North Carolina's Center for Urban and Regional Studies.

Financial Literacy and Education Commission-CSREES is one of 20 federal agencies represented on the Financial Literacy and Education Commission, established under Title V, the Financial Literacy and Education Improvement Act which was part of the Fair and Accurate Credit Transactions (FACT) Act of 2003. The FACT Act named the Secretary of the Treasury as head of the Commission and mandated the Commission include 19 other federal agencies and bureaus. The Commission coordinates financial education efforts throughout the federal government, and supports the promotion of financial literacy by the private sector, while also encouraging the synchronization of efforts between the public and private sectors. In 2008, USDA and the U.S. Treasury coordinated a symposium naming 10 research priorities for financial literacy and education. CSREES also is a federal partner in the *Jump\$tart Coalition for Personal Financial Literacy*, which focuses on Kindergarten through post-secondary financial literacy; the American Savings Education Council, which focuses on financial security in retirement, and the National Savings Forum, designed to encourage wealth-building and debt reduction by American households.

What Kids Can Do (WKCD) is a national nonprofit organization founded in January 2001 by an educator and journalist with more than 40 years' combined experience supporting adolescent learning in and out of school. This organization came out of their desire to promote perceptions of young people as valued resources, not problems, and to advocate for learning that engages students as knowledge creators and not simply test takers. They sought to bring youth voices to policy debates about school, society, and world affairs. WKCD is also grant maker, collaborating with youth on multimedia, curricula, and

research that expand current views of what constitutes challenging learning and achievement. <http://www.whatkidscando.org/>

Foundation for Rural Education and Development (FRED) is a 501(c)(3) created by the *Organization for the Promotion and Advancement of Small Telecommunications Companies*. FRED was put in place to address the educational and developmental needs of rural areas. This organization provides funding for scholarships and awards that improve the educational, social, and economic conditions of rural areas. FRED's main role is to assist telephone companies in promoting rural development. FRED currently offers technology grants for rural schools; provide scholarships ranging from \$1000 - \$5000 to rural students and assist in providing rural junior and senior students with an expense-paid week of learning opportunities in nation's capital on the government, civic affairs, and telecommunications regulation. <http://www.fred.org/aboutus.html>

Great Lakes Rural Community Assistance Program (RCAP) - began as a local project in Roanoke, Virginia in 1969, and has expanded into a national network of non-profit organizations that serve rural and Native American communities in all 50 states and Puerto Rico. RCAP works with communities to address their drinking water, wastewater treatment, and other community services and development needs. http://www.glracap.org/index.php?page_name=Home

Rural Community Assistance Program - is a nonprofit organization that assists rural communities by providing training, technical assistance and access to resources. This company is headquartered in West Sacramento, California, and serves rural communities in 13 western states, plus the Western Pacific. <http://www.rcac.org/>

Section II: Primary Knowledge Areas

This section articulates the programs in this portfolio that contribute to developing vibrant communities by improving capital in the seven areas of: human, social, civic/political, cultural, natural, financial, and built.

In order to retrieve information from electronic systems, the programs are classified by Knowledge Areas (KAs) that have been developed by the agency. These KAs were described briefly in the introduction part of this Portfolio. They are discussed in great detail in the following pages.

Each KA describes multiple programs or educational events that are funded, conducted, evaluated, and reported through agency systems. In addition to describing the programs, information is also included as to the type of funding, amount of funding, outputs, and outcomes. There are also examples of teaching, research, and Extension efforts.

The information is presented in the following order:

KA 801 and 607: Individual and Family Resource Management and Consumer Economics

KA 608: Community Resource Planning and Development

KA 724: Healthy Lifestyles

KA 802: Human Development and Well-Being

KA 803: Sociological and Technological Change Affecting Individuals, Families and Communities

KA 804: Human Environmental Issues Concerning Apparel, Textiles and Residential and Commercial Structures

KA 805: Community Institutions, Health, and Social Services

KA 806: 4-H Youth Development

KA 801/607: Individual and Family Resource Management and Consumer Economics



How people obtain and use resources of time, money, and human capital; and the demands, preferences, and behavioral responses and needs of consumers.

Knowledge Areas 801 and 607: Individual and Family Resource Management and Consumer Economics

KA 801 & 607 Overview

Knowledge Areas 801 and 607 are combined to reflect the focus on the individual as a consumer of goods and services, and manager of household resources. Research, education, and extension work in this area increases knowledge about how individuals and families obtain and use resources of time, money, and human capital to help sustain their communities and improve their quality of life.

The objectives of Knowledge Areas 801 and 607 are:

- to help emerging adults and individuals in poverty transition to and sustain financial independence;
- to help vulnerable individuals and families improve financial stability, or the ability to meet day-to-day expenses;
- to encourage planning, savings, and investing to achieve lifelong financial security; and
- to understand how consumer choice affects household and business prosperity.

For the purposes of this KA, the “capitals” are defined as:

- Cultural capital is built by understanding how a person’s family of origin and other social influencers affect how resources, especially money, are managed.
- Human capital is built by understanding how a person’s capacity to make and spend money affects lifetime financial security.
- Social capital is built as all transactions in the marketplace revolve around consumer confidence.
- Financial capital is of primary relevance with these knowledge areas since building wealth is at the cornerstone of research, education, and extension work.

Saving and investing is pivotal to household asset development. Research has repeatedly refuted the assumption that low-income, limited-resource people cannot save. There are "savers" and "spenders" in all income classes. While those with low or modest incomes cannot save as rapidly as the affluent, almost all have the ability to build wealth over time. Saving is important at all economic levels, and even more so for low-income families who have fewer resources to withstand economic emergencies and shocks.

When a household controls consumer spending and manages risk, thus controlling debt, it can channel savings for potentially higher-yielding outcomes (e.g. healthy lifestyles; health, life and disability insurance to manage risk and protect assets, and stocks, bonds, and mutual funds) or into home and small business ownership. Buying a home increases assets, in most cases, and is a key contributor to community prosperity. Where home

ownership flourishes, residents take more pride in their community, are more civic-minded, benefit from better school systems, and experience lower crime rates.

Household assets also increase as a result of investing in and growing a small business. Such businesses, which account for more than half of gross domestic product in the U.S. economy, are especially significant as a way for minority and rural households to accumulate wealth.

Extension targets programs for youth, low-wealth populations, and consumers making financial decisions throughout their lifetimes. It provides unbiased, research-based information and education via courses, web-based curricula, and other educational outlets for people to acquire knowledge, skills, and motivation to build wealth, not debt. The emphasis of extension programs is on behavioral change to build personal wealth, increase positive communication about money within the family context, obtain the skills to buy and maintain a home or start up a thriving business, optimize purchase decisions, avoid abusive lending practices, safeguard financial identity, and plan for financial security over the lifetime.

Work in these knowledge areas also is concerned with promoting research that expands our understanding of the macro-economic and societal incentives and barriers to financial security. Research also serves as a foundation for policy and practice in family resource management and consumer education. Further, these activities are concerned with promoting efforts and opportunities in higher education to prepare new scientists, financial services providers, and educators to help individuals and families build wealth, not debt. The results are organized by the higher education, research, and extension programs.

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KA 801 & 607: Individual and Family Resource Management (Family Economics) and Consumer Economics Logic Model

Situation	Inputs	Activities	Outputs	Outcomes		
				Knowledge	Actions	Conditions
<p>Many Americans work diligently to earn a living. Yet inadequate savings, too much debt, & poor planning for potential major life events leave them financially vulnerable, especially during times of world economic turmoil.</p> <p>U.S. personal savings as a percent of disposable income is near zero. Seven in 10 households use credit cards as a safety net to pay daily expenses. More than half of Americans report living paycheck to paycheck & are not saving enough for retirement. Eight out of 10 Americans say the economy is a significant cause of stress.</p> <p>Research is needed to inform public policy, education, and practice leading to family financial well-being.</p> <p>Financial services professionals, researchers, & community educators are needed.</p>	<p>Financial Resources (Combined Funding for 2004-2008 Totals over \$19M Source: Current Research Information System: CSREES Federal & State Agencies Public/Private Foundations In-kind Contributions from Partners</p> <p>Human Capital: CSREES NPLs Administrative Support Faculty/ Researchers Extension Educators/ Teachers Volunteers External Partners Central eXtension staff</p>	<p><u>Research Activities:</u> Research on household savings behavior, financial literacy competency, and how economic socialization affects financial behavior leads to quality programs and informs public policy Extension professionals identify research needs Education links theoretical and applied research to practice</p> <p><u>Educational Activities:</u> Distance education Undergraduate and graduate degree programs focused on family financial planning</p> <p><u>Extension Activities:</u> Program development, delivery, and evaluation Professional development extension leadership for the Financial Security for All Community of Practice</p>	<p>New fundamental or applied knowledge</p> <p>Learning lessons</p> <p>Interactive learning tools</p> <p>Financial calculators</p> <p>Practical knowledge for policy and decision-makers</p> <p>Information, skills & technology for individuals, communities and programs</p> <p>Participants reached</p> <p>Students graduated in family financial planning</p> <p>Partnerships created</p> <p>Community educators trained to deliver outcomes-based programs</p>	<p>Individuals and families gained knowledge related to the following key financial management concepts:</p> <p>Spend less than earnings Avoid excess debt Improve credit worthiness Plan for tomorrow while keeping pace with day-to-day needs Save and invest regularly Protect financial identity</p> <p>Identifying policy-relevant questions</p> <p>Identifying emerging societal needs for human capital related to financial education, policy, and practice</p>	<p>Individuals and families have adopted one or more practices to reduce debt and increase savings</p> <p>Developed financial plans leading to a lifetime of financial security</p> <p>Used recommended practices, set or revised financial goals.</p> <p>The effects of current and proposed policies are analyzed; studies are conducted to learn what helps change behavior</p> <p>Distance education strategies developed</p>	<p>Individuals and families contribute to economically viable communities by:</p> <p>Financial capital – Saving, reducing debt, and avoiding bankruptcy Human capital – Increasing capacity to earn money and spend wisely Cultural capital – Communicating about money Social capital – Protecting financial identity</p> <p>Increased number of students complete degree and certificate programs (human capital)</p> <p>Research informs public policies that encourage education about and financial action leading to household wealth-building</p>

<p>Assumptions - Evidence-based education can enable rural individuals & families to achieve financial self-sufficiency, stability, & life-time financial security. Americans can earn a living wage. Public policies encourage household asset-building</p>	<p>External Factors - Institutional commitment; amount of volunteer and nonprofit participation; changing priorities; economic conditions, including employment & coordination and cooperation with other government entities and non-profit partners concerning policies related to savings, debt reduction, and overall individual and family financial well-being.</p>
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Higher Education - Results

Great Plains-Interactive Distance Education Alliance

Start-up funding provided by the U.S. Department of Education and CSREES unit funds; sustained by tuition and fees
Human and Financial Capital

Through Great Plains-Interactive Distance Education Alliance (Great Plains-IDEA) <http://www.gpidea.org/> which launched in 1999, students enroll in one institution and take online courses from eight universities in the alliance. Coursework is offered by Colorado State University, Iowa State University, Kansas State University, Michigan State University, University of Missouri, Montana State University, University of Nebraska, North Dakota State University, Oklahoma State University, South Dakota State University, and Texas Tech University. The master's degree includes 14 courses. Six of these cover the 89 competencies established by the Certified Financial Planner Board of Standards (insurance, investments, retirement planning, estate planning, personal income taxation, and fundamentals of financial planning); five courses include housing and real estate, professional practices, two practical experiences, and case study/capstone; and three cover family concepts (family systems, family economics, and family financial counseling). Family financial planning is ranked as a high demand career by Jobs Rated Almanac. The land-grant university partnership has the potential, but not the capacity university-by-university, to deliver degree and graduate certification programs that address the societal need for financial services professionals.

Outputs:

- Guidebook for offering online degree and certificate programs via an alliance of universities
- Web site www.gpidea.org
- Certified Financial Planner® Board of Standards registration

Outcomes: Between 1999 and 2008, Great Plains-IDEA has graduated 90 students with master's degrees and 21 students with graduate certificates in Family Financial Planning. As of 2008, there are 191 students currently in the program, which has been registered with the Certified Financial Planner Board of Standards, Inc. Data about students who have achieved the Certified Financial Planner® (CFP) designation is not recorded. Completion of coursework prepares students to take the CFP exam.

1890 Family and Consumer Sciences Distance Instructional Alliance

Start-up funding provided by CSREES Capacity Building Grant; sustained by tuition and fees
Human and Financial Capital

Faculty from eight 1890 (historically Black) Land-grant Institutions were trained through the Great Plains Interactive Distance Educational Alliance Family Financial Planning masters degree program. A Family Financial Planning certificate program or minor prepares undergraduate students for the Certified Financial Planner® exam.

Outputs:

- Web site <http://www.1890fcsdia.net/>
- Certified Financial Planner® Board of Standards registration

Outcomes:

The first student completed the Family Financial Planning program in December 2008 from the University of Maryland Eastern Shore. Thirty-seven students are currently enrolled in the program. Comments from faculty – “We have four different cohorts and while it is our intent to offer two courses each semester and one in the summer, the class numbers do not always make, thus, a class is cancelled and students completion dates may get extended. Several students start, but find the program a bit rigorous and slow the pace depending on their course load/work schedule. We have a combination of traditional undergraduate students and non-traditional older students that have degrees and are pursuing the certificate versus a minor.

Research - Results

NC-1172 -- The Complex Nature of Savings Multi-state Research Project

CSREES formula grants (Hatch) and CSREES unit funds with in-kind support by the Consumer Federation of America

Informs education, policy and practice, which builds Cultural, Human, Social, and Financial Capital

The purpose of this multi-state research project is to go beyond the economics of personal savings behavior to increase understanding about the cultural and psychological motivators and barriers. The potential implications for policy and education are significant. The findings are in high demand given global economic uncertainty, when personal savings can mean the difference between household financial sustainability and bankruptcy. The U.S. Bureau of Economic Statistics, which tracks the personal savings as a percentage of disposable income, reports the rate at about four percent in the 1st quarter of 2009, up from some recent periods when the rate fell below zero. Analysts fear this increase is based on fear due rather than a social shift in how savings is viewed by the America people. The NC-1030 project is pertinent to this discussion. Faculty members from 17 land-grant universities are represented on the team.

Outputs:

- Conducted monthly phone meetings and annual face-to-face work session.
- Produced annual reports on <http://nimss.umd.edu/homepages/home.cfm?trackID=10036>
- Developed theoretical model that indicates which factors (socialization, financial knowledge, environment, resources, psychological and economic factors) are related to subjective and objective measures of saving
- Developed survey instrument to test theoretical model
- Developed partnership with the Consumer Federation of America to obtain access to the America Saver database for testing the model via mailed and on-line surveys

Outcomes: due to the newness of this program outcomes are pending.

Program Title: NC-1030 – Family Firms and Policy Multi-state Research Project

Funding Source: CSREES formula grants (Hatch) and the National Science Foundation
Informs education, policy and practice, which builds cultural, human, social, and financial capitals

Program Description: This research project, involving faculty members from 11 land-grant universities, focuses on family business research from the perspective of family, business, and the interplay between the two systems. The multi-disciplinary research group has been in existence for more than 10 years, with the first two phases as NE-167. The third phase, which began in 2006, is designed to collect the third wave of the National Family Business Study. A particular focus is the resiliency of family business in natural disasters (an external disruption) and federal disaster assistance.

Outputs:

- 5 special issues of academic journals, 103 refereed journal articles and book chapters, 2 books, 135 non-refereed articles, Extension publications, and conference proceedings
- Annual reports on <http://nimss.umd.edu/homepages/saes.cfm?trackID=7857>

Outcomes:

- Development of a Sustainable Family Business Theory, the first to acknowledge the interplay between the business and family dynamic
- Development of the Economic Vulnerability Index

Cooperative Extension - Results

Financial Education for Youth -- NEFE® High School Financial Planning Program

CSREES formula, State, and County funding supplemented by the National Endowment for Financial Education

Cultural, Human, Social, and Financial Capital

In 2007, the National Endowment for Financial Education (NEFE®) launched a new NEFE® High School Financial Planning Program® (HSFPP) The web site at <http://hsfpp.nefe.org> includes information for teachers, students, and parents. The program was introduced to a national network of representatives, including CSREES (in partnership with the Land-grant University System), and the Credit Union National Association (CUNA), and America's Credit Unions. Through a Memorandum of Understanding between CSREES and NEFE, Cooperative Extension's campus- and county-based staffs across in 46 States have collaborated with NEFE for two decades to increase the financial literacy of high school students using this evidence-based, award-winning curriculum. This financial education is important because teens are active consumers of financial products and use transaction accounts, credit and debit cards, loan instruments and investment vehicles. Further, nearly half of the states do not include personal finance instruction in education standards for public schools and parents often are not the best financial management role models for their children. With the new NEFE HSFPP program, teachers are being trained and teens across the country are using the new material.

Outputs:

Cooperative Extension, a major program partner along with the Credit Union National Association and America's Credit Unions, accomplished the following:

- 191 training and conference events at which over 8,200 instructor's manuals were distributed.
- The new NEFE HSFPP has won two national awards -- the Association for Financial Counseling and Planning Education Best Financial Education Curriculum, and the Institute for Financial Literacy Excellence in Financial Literacy Education Award.
- Overall, the launch has produced over 7,000 orders for over 700,000 student guides.

Expected Outcome:

Extension educators and partners will likely increase their ability to promote and recruit teachers to deliver and evaluate the programs while increasing awareness and knowledge about the HSFPP. Further, students will gain knowledge of financial management and have increased confidence in making financial decisions. Ultimately, students will achieve and maintain financial security over their lifetimes.

- A rigorous, national evaluation of the program, conducted by the University of Minnesota Extension, is funded and scheduled for late 2009. Two previous evaluations, also conducted by the same lead researcher, showed at least 10 hours of instruction using the NEFE HSFPP resulted in changes in financial knowledge, increased positive financial action (e.g. opening or adding to a savings account), and financial self-efficacy for more than half of the students.

Savings for Financially Vulnerable Individuals and Families – America Saves and America Saves Week

CSREES formula, State, and County supplemented by funding provided by the Consumer Federation of America

Cultural, Human, Social, and Financial Capital

CSREES, in partnership with the Cooperative Extension System, provided leadership for America Saves, a continual social marketing campaign to encourage low- to middle-income Americans to build wealth, not debt, and America Saves Week, in late February each year. America Saves Week is a nationwide campaign in which a broad coalition of nonprofit, corporate, and government groups help individuals and families obtain the knowledge, skills, and motivation to save money. Savings are needed to buy a home, pay for an education, prepare for retirement, and weather economic storms. Most Americans are not saving adequately, and many lower-income households do not have sufficient emergency savings for unexpected expenditures such as car repair. CSREES joins other national partners, such as the Department of Defense, Federal Reserve Board, National Foundation for Credit Counseling, and United Way of America.

Outputs:

In 2009, Cooperative Extension in 29 states has either led or participated in a coalition to offer 75 local Saves campaigns. In these states, the following was accomplished:

- 1,465 direct methods such as workshops, mail, financial fairs, and conferences reached 97,352 youth and adults.

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- 1,457 indirect methods, such as media, websites, exhibits and flyers, reached 7.7 million Americans.

The national Extension website dedicated to America Saves Week

http://www.csrees.usda.gov/nea/economics/fsll/edu_saves.html offers press releases, motivational workshops, and grant opportunities offered by the Consumer Federation of America. This site also offers other resources such as an educator's guide, reports and videos.

During the 2008 America Saves campaign, Extension collaborated with 1,320 partners and volunteers, including financial institutions, banks, credit unions, and school systems. Funds derived from sponsorships or in-kind funds, such as savings bonds, piggy bank awards, and free media amounted to \$454,265.44. At the national level, Extension announced www.extension.org, where experts offer unbiased help with financial questions 24-7, and 365 days a year.

Outcomes

- During America Saves Week 2008, 5,596 Savers planned to save \$748,906 in monthly savings and pledged to open 4,926 new accounts.

Online Information and Education – Financial Security for All Community of Practice

CSREES formula grants and State Extension

Cultural, Human, Social, and Financial Capital

In February 2008, eXtension, with funding from CSREES, launched Financial Security for All, www.extension.org/personal_finance, an online tool to help Americans make sound financial decisions. This eXtension site (pronounced ee-Extension) provides research-based, reliable consumer information with online learning lessons, more than 1,400 frequently asked questions, financial calculators, fact sheets, online chats, and links to local Extension programs. The Community of Practice includes nearly 250 Extension educators who staff the popular Ask an Expert function. This site also offers an Ask the Expert feature that allows the electronic submission of specific questions which generates a timely personal response from an Extension educator within 24 hours

Outputs:

- All components of www.extension.org/personal_finance
- A segment on Managing in Tough Times in response to the economic crisis
- More than 1.7 page visits since launch
- Training for 250 Extension educators who are members of the community of practice
- Leveraging of additional \$500,000 in grant funding from the Financial Industry Regulatory Authority (FINRA) Investor Education Foundation and others

Outcomes: An evaluation team is in place to determine if financial action has been taken as a result of learner participation in online lessons, chats, and other resources available through the site.

New Directions

- Using Social Networking in Financial Education – A training opportunity is scheduled for Extension educators in November 2009 to learn how to use Facebook, Twitter, YouTube, and other online social networking tools to expand knowledge and promote positive financial action by individuals and families.
- Personal Finance Assessment System – The Department of Defense has provided \$400,000 funding for an online test all new recruits must pass as part of basic training. Financial fitness is now considered as critical as physical fitness for combat readiness. The system, created by North Carolina State University Extension, is expected to be launched in 2010.
- National Research Priorities for Financial Literacy and Education – Efforts are underway to further define the science base undergirding the personal finance profession. CSREES will work with faculty, foundations, and federal partners to address the 10 research priorities identified at the symposium it facilitated in October 2008 with the U.S. Treasury.
- Farm and Family Financial Management – There is a need to manage financial risk, both from the farm business and arm household perspectives, and recognize how the two intersect. Efforts will continue to focus on this crosswalk by involving personal finance and farm management experts in joint projects. The premiere effort will be the launch in 2010 of an online investor education program targeted to farm families called *Investing for Farm Families*.
- National Strategy for Financial Literacy and Education – CSREES is one of 20 federal agencies making up the Financial Literacy and Education Commission. The Commission will update the national strategy in 2009 to focus on evidence-based education, and policy-relevant research related to the national priorities

KA 608: Community Resource Planning and Development



To enhance quality of life and the understanding of problems, opportunities, and planning for renewal and growth.

Knowledge Area KA 608: Community Resource Planning and Development

Introduction

This KA encompasses a wide array of programs that “*expand economic opportunities in rural America by bringing scientific insights into economic, business, and community decision-making.*” The time period covered in this Portfolio report represents a period of remarkable and rapid change in America. In rural areas, farmers, ranchers, businesses, communities, governments, and families face challenges -- and opportunities -- few could have predicted a decade, or even one year ago. Community is the focal point. It is where people adapt to change and where they can become change agents. It is where people can feel a sense of personal involvement, take pride in their actions, and join with neighbors to secure the places where they live.

As change accelerates, rural Americans are looking for resources, capable partners and fresh approaches to community and economic development. The activities selected for inclusion in this section of the Portfolio represents significant investments in new knowledge, education, and extension to help people strengthen their rural communities and develop active economic development programs.

These investments are critically important for the nation. Strong and secure communities underlie rural America’s ability to provide a safe and secure food supply, address deepening world hunger, and develop a successful domestic energy program.

This KA, as well as the portfolio is discussed within the “Community Capital Framework” developed by Cornelia and Jan Flora (2006). It is a systems-oriented framework that fosters strategic program planning, development, and evaluation. There are examples of research, education, and extension activities that span the seven “capitals,” or community asset pools, at the heart of this framework. For the purposes of this KA, the “capitals” are defined as:

- Social capital – connecting people and organizations through trusted relationships that enable people to work together for a shared future;
- Financial capital – understanding the complex relationships found in the rural economy that affect poverty, jobs, farms, firms, and restructuring;
- Human capital – developing workforce skills and building the capacity for systems analysis as individuals and communities move through this period of change;
- Built capital – assessing and addressing infrastructure needs, telecommunications capacity, and community services;
- Political/Civic capital - improving institutions of governance, leadership skills, planning skills, and civic engagement;
- Cultural capital – understanding and building bridges across diversity and traditional divisions, ensuring inclusive community participation and equal opportunity.

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Programs in this KA are funded, developed, implemented, and evaluated primarily by:

- CSREES Competitive Programs, including the Small Business Innovative Research (SBIR) Rural Development Program and the National Research Initiative (since FY 2009, called Agricultural and Food Research Initiative and hereafter, referred to as AFRI);
- CSREES Regional Rural Development Centers program;
- Multi-State Research Projects;
- Extension Formula Funded Programs;
- Community Resource and Economic Development Extension Professionals;
- Partnerships with other federal agencies, the private sector, private foundations, and non-profit organizations.

These activities feed into and reinforce programs in the other “primary” Knowledge Areas in this Portfolio (youth development; healthy lifestyles; human development and family well being; community institutions, health, and social services; individual and family resource management; human and environmental issues; and social and technological change). In addition, KA 608 melds with such tightly connected “secondary” Knowledge Areas and CSREES programs as Sustainable Agriculture, Risk Management Education, farm management, markets and trade policy, international development, and diversity education.

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KA 608: Community Resource Planning and Development Logic Model

Situation	Inputs	Activities	Outputs	Outcomes		
				Knowledge	Actions	Conditions
<p>The greatest challenges to rural community resource planning and development during this period have come from: Rapid technological process, which has increased the availability of managerial tools on the internet; Direct and indirect effects of the globalization of agricultural trade; and, Domestic demographic changes due to age and ethnicity; economic restructuring with loss of manufacturing and growth of low-waged employment in the service sector.</p>	<p>Financial Resources Over \$66.3M from 2000-2005 - Entrepreneurship Communities of Interest (Cols) - Federal - State - CSREES - Foundations</p> <p>Human Capital: - Entrep. Communities of Interest (Cols) - CSREES NPLs - Faculty - Researchers - Extension Administrators - LGU Extension Educators & Researchers including 1890s and 1994s - Stakeholders - Volunteers</p>	<ul style="list-style-type: none"> - Conduct listening sessions to assess needs of Cols - Establish an advisory board - Create Regional Entrepreneurship Resource Teams - Create National CoP Entrepreneurship Team -Expand Community Development on-line Master's degree -Establish a national Foundations of Practice for community and economic development -Research on rural industry clusters, targeted economic development, land use patterns, demographic change, and new regional analysis methodology -National e-Commerce Initiative -Rural Community College Initiative 	<p>Participation: - Kellogg Foundation entrepreneurship development system; Reps from SBDCs, AEO, & Chambers of Commerce; and entrepreneur, youth, interested citizens and RRDC staff</p> <ul style="list-style-type: none"> - Kellogg Foundation, Ford Foundation, Farm Foundation, Northwest Areas Foundation, ARC, AEO, RUPRI Center for Rural Entrepreneurship - LGU Extension and Research Faculty --Rural Community College Extension and Faculty -Skilled Community and Economic Development Extension faculty and practitioner -Logic Models and Impact Measures 	<ul style="list-style-type: none"> - Increased awareness of Communities of interest (CoIs) of the work done by LGU in addressing rural entrepreneurship - Established & strengthened the CoIs relationship with the Cooperative Extension Service of RRDCs - Expanded ability of extension to mobilize national and regional resource on the changing needs of the entrepreneurship Cols -Science of rural industry clusters, minority farmers, immigration, and impact measurement -food needs of vulnerable people Linkages between sustainable agriculture and economic development -new rural economic development approaches 	<ul style="list-style-type: none"> - Increased the number of stakeholders advocating the expanded investment by local, state and national governments in a comprehensive rural entrepreneurship educational. system - Increased funding by philanthropic sectors in extension rural entrepreneur-ship activities - Established a network of entrepreneurs which share best practices on a sustained basis -Increased #s of Extension faculty training in community and economic development -2 new multi-state projects on immigration -Youth establishing small businesses -Health and food assistance providers better informed about food needs of vulnerable populations -Sustainable ag and rural development partnering 	<ul style="list-style-type: none"> - Passage of entrepreneur-ship supportive policies at the local, state and national levels of the government - Long-term investment by CSREES in extension entrepreneurship activities delivered through the RRDCs and state extension programs including youth-focused work - Diffusion of entrepreneur-ship networks across rural America -Long-term investment by CES in CRED professional development -Partnerships with rural community colleges -Entrepreneurial sector filling gap left by economic restructuring -Food assistance organizations prepared to real rural poor -Rural development practitioners applying science-based methods including targeted economic development and industry cluster strategies
<p>Assumptions: Rural communities have the resolve to thrive and just need opportunities. They are best at deciding. They are best at deciding their own outcomes and allocating resources accordingly. Smart, sustainable economic development can take place.</p>				<p>External Factors – Involve rapid technological process, such as the availability of new managerial tools due to the maturation of the internet and indirect effects of globalization of agricultural trade and domestic demographic changes due to age and ethnicity.</p>		

The following key outputs and outcomes for KA 608 demonstrate the progression toward achieving the goals of the portfolio. They are organized by teaching, research, extension, and integrated activity results.

Teaching Results

Community Development Online Master's Degree Program

Initial funding from a USDA-CSREES Higher Education Challenge grant; continued resources from the participating Universities, the North Central Center for Rural Development and student fees

Launched in 2004, this online advanced degree program in Community Development is conducted through the Great Plains Interactive Distance Education Alliance (IDEA).

Outputs:

- Six universities participate: Iowa State University, Kansas State University, North Dakota State University, South Dakota State University and the University of Nebraska.
- Students take a series of required core courses and choose electives from three specialization tracks; six hours are dedicated to the students' capstone experience. The specialization tracks include Building Economic Capacity, Natural Resource Management, and Working with Native Communities. This cutting edge, trans-disciplinary, inter-institutional program has been a major success.

Outcomes:

- One of the MA program's first students, Staci Eagle Elk, who attends North Dakota State University, is Director of Tourism for the Osage Nation. She reports "This program is helping me in my job by providing me the necessary tools to make decisions for economic development on the Osage Reservation." As a mother of two children while she works full time, she benefits from the online structure of the Master's Degree: "I usually spend my weekends and late nights catching up on reading assignments." She also likes that the program includes a track specifically on Native Communities.
- Another student involved in the "Working with Native Communities Track" is Carrie Archdale from Iowa State University. She has found many connections between the degree program and her work in the Agriculture Department at Fort Peck Community College. Carrie says, "I have used much of my knowledge and findings within my job and will make a recommendation to the Fort Peck Tribes from my findings."

Research Results

Small Business Innovative Research (SBIR) Rural Development Program

\$19 million for all SBIR Projects – a portion of which funds Rural and Community Development Projects - CSREES

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The Small Business Innovation Research (SBIR) program offers grants to qualified small businesses (including small and medium-sized farms) in support of high quality, innovative research related to important scientific problems and opportunities in agriculture that could lead to significant public benefit if successfully commercialized. The SBIR program has awarded more than 2000 grants since its inception in 1983, allowing hundreds of small businesses to explore their technological potential and profit from the commercialization of their innovative ideas. A portion of the funds can be used for activities conducted by university or government scientists.

SBIR is a three phase program that includes:

Phase I--grantees normally test the proof of concept with a maximum grant of \$80,000.

Successful Phase I grantees are invited to submit applications for Phase II funding.

Phase II grants, which are limited to \$350,000, can lead to the development of a prototype.

Phase III is the commercialization phase and is not funded by the USDA. Grantees are encouraged to seek funding from other entities and show commercialization potential at the time of applying for a Phase II grant.

Funding for the SBIR program in FY 2008 is estimated at \$19 million and is allocated over 12 broad topic areas. Of the 12 topic areas, three are particularly relevant to this portfolio: Small And Mid-Sized Farms, Marketing and Trade, and Rural and Community Development. Since projects from Small and Mid-Sized Farms and Marketing and Trade are reported in other portfolios, the primary focus of results reported in this portfolio relates to Rural and Community Development.

Primarily the Rural and Community Development topic area focuses on the development of new technologies, and on the innovative application of existing technologies to address important problems and opportunities affecting people and institutions in rural America. Since FY 2005, this topic is less centered on agriculture *per se*, and more on areas of growing importance to rural communities (e.g. enhance the environment, disaster resilience, service delivery, alternative energy production and conservation, youth development, and entrepreneurial and workforce skills) that could provide significant national benefits.

SBIR projects are effective technology transfer mechanisms moving publicly developed technology into private sector applications that benefit different aspects of American agriculture and rural America. For projects funded under the Rural and Community Development topic, the outcomes also include improvements in the quality of life of rural people (protecting the environment, creating employment, improving service, etc.)

Please refer to the following link for more details about the SBIR Program:

<http://www.csrees.usda.gov/funding/sbir/sbir.html>

Outcomes:

Financial Capital

- A SBIR grant helped to develop the Inovoject® system that injects viral, bacterial or fungal vaccines into avian eggs. Revenues derived from the technology totaled \$46

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million dollars in 2004 and have contributed to the growth of a company with 300 employees worldwide. Most of the poultry farms are located in rural communities.

Natural Capital

- TNC Industries Inc., using SBIR program has modified and improved a wireless remote control tractor for use in forest fire operations. The Small Crawler Tractor 2 (SCT2), designed, constructed and assembled by TNC-2 Industries in Weippe, Idaho, provides maximum safety to firefighters by building a fire line in front of wildfires. This technology helps protect the environment and preserve the quality of life through reducing the risks from wildfires.
- A SBIR grant has helped to develop a wood-based erosion control material (WoodStraw™) that is weed-free, long-lasting, and with superior performance to agricultural straw in watersheds, forestlands, and road construction. Within six months of completing SBIR project, 92.5 tons of WoodStraw™ mulch had been sold to eight customers. This technology not only protects the rural environment but also supports rural jobs and improves independent veneer mill sustainability through value-added outlet for low grade veneer.

Built Capital

- A SBIR Phase II grant provided in 2007 is developing reliable, off-grid power for remote applications such as security cameras along national borders, geological sensors, or wireless repeaters for broadband internet. Expected outcome from Phase II is a full function prototype of a modular hybrid power system that collects solar energy over a wide range of illumination intensities and operates unattended for up to 10 or more years. This technology has the potential to enhance homeland security and enhance access to the internet in rural communities.
- Another grant provided in 2007 is developing workforce training appropriate to Indian reservations. The expected output is a computer integrated suite of training applications for technical skills and soft skills customized to Indian reservations. CD_ROM is being used. The target market is over 1,000 tribal organizations on 275 reservations.
- A FY 2008 Phase II grant is developing video telepsychiatry services through online clinic format, paired with medical record keeping system, etc. Justification for this project is that rural America has a shortage of mental health facilities and there is a stigma attached to obtaining psychiatric treatment.
- Following Hurricane Katrina, USDA SBIR staff worked with the National Science Foundation (NSF) and the Department of Homeland Security (DHS) to develop a priority funding area on disaster resilience. Competitive grants related to disaster resilience will generate new knowledge and new resources in coming years to help individuals, families, communities, and businesses prepare for disasters (disaster readiness) and recover in post-disaster circumstances.

The National Research Initiative (since FY 2009, called Agricultural and Food Research Initiative and hereafter, referred to as AFRI)

\$2.5 Million, CSREES (2008)

AFRI is the largest competitive grants program at CSREES with annual appropriations at about \$190 million. The Rural Development program is one of approximately 40 programs funded by AFRI. With annual appropriations of about \$2.5 million, the Rural Development program is one of the small programs in AFRI. Therefore, since FY 2006 the program is offered every other year by combining the funding of two years.

Many other AFRI programs also contribute to this Portfolio including two other programs in Agricultural Economics and Rural Communities' cluster of AFRI, i.e., Agribusiness Markets and Trade and the Agricultural Prosperity for Small and Medium Sized farms programs.

The Rural Development program of AFRI has adopted the following three multidisciplinary long-term goals: (1) develop and implement policies and practical strategies to reduce poverty in rural areas by expanding economic opportunities beyond the farm-gate; (2) protect and enhance economic growth and the natural resource base of rural areas by developing strategies that reduce the competition between economic growth and the environment, and (3) improve community economic vitality by enhancing political, human and social capital in rural communities. Beginning in FY 2008, the Rural Development program will fund only projects that include any two of the following three activities: research, education, and extension.

As indicated in the table below, the AFRI Rural Development program has awarded \$11.6 million in grants between FY 2005 and FY 2008.

AFRI Rural Development			
	FY 2005	FY 2006	FY 2008
Total Funding	\$2,400,000	\$4,131,000	\$5,100,000
# of Submissions	42	59	49
# of Awards	7	12	11
Success Rate	16.7%	20.3%	22.4
Average grant size	\$342,857	\$344,250	\$463,636
# of Graduate Students	7	15	

Based on funding priorities, projects have become more focused on topics such as youth development and retention, entrepreneurship development, appropriate small business development, and developing and protecting the environment.

Program Key Outputs and Outcomes

The following are some of the outputs of the 7 AFRI Rural Development studies funded in 2005, based on the project termination reports submitted to CRIS by the Project Directors:

- 30 publications and/or presentations at national or international journals and meetings

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- Funded 7 graduate students
- Several conferences, e.g., the conference on Entrepreneurship at Michigan State University in 2008 that attracted more than 300 people. Another example is the symposium on Rural-Urban Interplay and Nature-Human Interactions at Oregon State University in 2005 which was attended by about 150 people.
- Development of new curricula, e.g., Creating Entrepreneurial Communities at Michigan State University.
- Several data bases, e.g., the qualitative and quantitative data on the cultural knowledge and values about land conservation held by farmers, environmentalists, land developers, local government officials, and land conservationists at University of Maryland. Another example is the completion of the spatial databases for Columbia County September 2007 by University of Wisconsin.

Because the AFRI Rural Development program funded only research projects in FY 2005, the primary outcomes were enhanced knowledge and information for policy development and assessment. Some other examples of outcomes are:

Natural Capital

- In 2007, Waupaca County, WI began tracking parcelization through a new database technique.
- In 2008, citizens in Sawyer County, WI utilized new land ownership data to begin negotiating conservation agreements with the United States Forest Service and Excel Energy of Minneapolis, MN.

Financial Capital

- Nine communities in Michigan participated in the in the entrepreneurship support program, and implemented various strategies to encourage survival of local start up businesses.

Small Farm Industry Clusters Project

\$36,444, AFRI

Human, Financial, and Cultural Capital

This research project was funded in FY2007 and is conducted by the Northeast Regional Rural Development Center (NRRDC). This project is confirming the importance of networks to economic well-being. Clusters of farms located in geographic proximity share economic relations, social relations, and a local value chain. Rural development practitioners can draw on cluster research to enhance and foster cluster growth in the agricultural sector, including among groups of minority producers. Research is needed to understand the origin, structure, and functioning of various clusters and networks to advance the science of clustered and targeted economic development strategies.

Outputs:

- a research report and paper was presented at the Rural Sociological Society annual meeting in 2008.

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- A Research Update to inform the collaborating farm clusters is being developed.
- A Handbook on “farm clusters” is assembled and will be published.
- An article was published in the *Journal of Community Development Society*.

Outcomes: This research is expanding the knowledge of economic change in the agricultural sector related to the origin and functioning of clusters of small farm producers in the Northeast. The farmers include different ethnic, racial, and gender groups: Hmong, African American, Women, and Latino. Outputs are planned to translate the scientific knowledge to Extension and practitioners as the research is completed.

Oregon State Project

AFRI

Social and Financial Capital

This AFRI funded program evaluates the impacts of natural endowments, accumulated human and physical capital, and economic geography on the spatial inequalities in economic development in rural America. In addition, the PI's are examining the effectiveness of public investment in rural infrastructure and urban amenity enhancement projects for stimulating economic development in distressed areas. The theoretical models were developed, data collected and the analysis has been completed on the interaction between location decisions of firms and households as they are affected by natural amenities, accumulated human and physical capital, and economic geography.

Outputs:

- Results suggest that geography is a primary cause of spatial inequalities in economic development, accounting for 96%, 89%, and 91% of the predicted differences in average median income, average employment density, and average land development density between the top and bottom 20% of counties in the United States.
- Natural amenities account for 36% of the predicted difference between the average median housing prices for the top 20% of high-housing-price counties and the bottom 20% of low-housing-price counties.
- Despite the dominant role of geography, the results also suggest that public investments in infrastructure and human capital development could contribute to economic development in remote areas.
- Manuscripts summarizing the models and results have been published in *Regional Science and Urban Economics* and *American Journal of Agricultural Economics*.

Outcomes: As a result a comprehensive database on natural endowment, accumulated human and physical capital, economic geography, and economic activities for all counties in the United States has been developed. The database will be available for use in future research and policy analyses.

With AFRI Rural Development program funding integrated projects beginning in FY 2008, more outcomes are expected and will be documented through CRIS reports and Project Director meetings.

Multi-State Research Projects

Hatch Funding from Agricultural Experiment Stations

The rapidly diversifying composition of rural people and rural places—for example, growth in the Latino population in the southern and North Central regions--bring both challenges and opportunities in community and economic development. Two new Multi-state projects have been organized under the leadership of the SRDC (SERA-37) and the NCRC (NC 1176).

The New Hispanic South (SERA-37) Multi-State Research Project

Experiment Station Formula (Hatch) Funds

Social, Financial, Human, and Cultural Capital

The goal of the project is to strengthen research, Extension outreach, and public policy work being done with Latinos in the South and to advance educational programs and technical assistance to meet the diverse needs of the growing Latino population and related changes in communities, the economy, and agriculture in the region.

Outputs

- Universities in 13 southern states and Puerto Rico are participating, along with universities in 10 other states.
- An Immersion Taskforce has been organized to develop training for immersion in US new immigrant experiences
- A conference was held in 2008 that focused on inclusive Extension Programming for Latinos.
- New website is established at:
http://srdc.msstate.edu/opportunities/hispanic_south.html#
- Interdisciplinary research is underway on demography, family, and farmworkers.

Latino Immigrants in the Midwest (NC-1176)

Formula (Hatch Funds), Agricultural Experiment Stations

Social, Financial, Human, and Cultural Capital

Outputs: An organizing meeting of 30 people across the region, sponsored by the North Central Regional Center for Rural Development identified specific working groups.

Outcomes: The ground work is laid for the land grant university system in the North Central region to develop the research and extension resources needed to help the Midwest respond to rapid growth of Latino population. The MSR plans to collaborate with SERA-37 on joint research and shared development of resources. Joint efforts started in 2008 and will continue.

Extension Results

Formula funding under Smith-Lever 3(d)

Pacific Island Communities: Building (STEPS) Sustainable Teen Entrepreneur Programs

CSREES Smith-Lever 3(d), Children, Youth, and Families at Risk line item

Social, Human, Cultural, and Financial Capital

This program was developed to equip Pacific youth with skills and abilities to earn money, thus improving their quality of life.

Outputs

- By April 2008, all island partners were trained in the National 4-H Be the E curriculum.
- American Samoa has 5 sites with a total of 76 youth participants, Marshall Islands has 2 sites with a total of 17 participants, Guam has 2 sites with 15 participants, Kosrae has 2 sites with 15 participants, and Palau has 3 sites with 37 participants.
- Community support is evident by the support from schools, businesses, participating partners and sites, and especially the American Samoa Community College Land Grant Program.
- The Guam Public School System and the Dededo Mayors have committed to participate in the program. The Tele-Communication Pilot Project Group with the government of the Republic of Palau was formalized and the Palau project will play a significant role in coordinating and developing the centers activities.
- Guam, Palau and Kosrae have received commitments from their Small Business Development Center (SBDC) to use their existing youth programs to deliver "Starting a Business and Developing a Business Plan" instruction. All 5 sites have solid commitments from community, business and private and non-profit organizations to assist in working with at-risk youth.

Kids with Biz Ideaz: A New Generation of Possibilities.

Smith-Lever 3(d), Children, Youth and Families at Risk
Social, Human, Cultural, and Financial Capital

Youth attended “The Kids with Biz Ideaz Entrepreneur Camp (E-Camp)” and were awarded Top D.B.A. (doing business as) Awards at the end of year YEP Trade Show. The Kidz Biz Apprentice Workshops was a series of five workshops that gave youth hands-on experiences in designing and producing a product that was test marketed at each of the workshops. Skills in sewing and textile design, safe and healthy food products, computer research for business web sites, developing a catchy slogan, and logo design were showcased.

Outcomes: Youth Participants learned:

- about e-commerce web businesses, product research and development, marketing strategies, digital photography for business web sites, advertising, and business collaborations,
- that there was something about them that was of great value,
- to look at their strengths and interest to develop a plan for a business in their community,
- that regardless of their grade point average, social-economic status, or their behavioral problems, they could be successful and that others would value their skills and expertise.

Integrated Activities Results

Regional Rural Development Centers (RRDC)

\$1.3 million - CSREES

The four CSREES Regional Rural Development Centers (RRDCs) coordinate rural development research, education and Extension programs cooperatively with the Land-Grant System universities and colleges in each of their geographic regions. Collectively, the Centers seek to strengthen the capacity of the Land Grant University System (research and Extension programs) across the nation to address critical contemporary rural development issues such as helping rural businesses to find new resources, develop and employ new skills, and improve their market share and catapult the efficiency of their products and services.

Each Center leverages the CSREES funding through grants from private foundations, other federal and state agencies, and the private sector. A table reflecting these extramural funds is in Appendix B.

Entrepreneurs and Their Communities, an eXtension Initiative.

eXtension Initiative Grants, \$18,500 and \$50,000

Financial, Human, and Social Capital

In 2007, a Community of Practice (CoP) was established under the eXtension initiative that brought together professors, experts, and partners to establish science-based, 24/7 web accessible resources for economic innovation. This CoP focuses on entrepreneurship and entrepreneurial communities to address the dramatic growth in dependence on self-employment—over 5 million people are self-employed in rural America-- and non-farm income to keep the agricultural economy functioning.

The web portal provides resources for entrepreneurship-friendly communities and for entrepreneurs themselves who are creating, sustaining, or expanding their e-business firms, in both the agriculture and non-agricultural economic sectors. In 2009, this CoP has the largest number of members (over 300) of all the CoPs in eXtension and engages 25 core team members from across 19 universities and 10 disciplines.

Outputs:

- Over 20 content areas have been developed in areas such as: business ideas, getting started, financing a business, agricultural businesses for entrepreneurs; building entrepreneurial communities, tools, case studies, and state/local policies for the entrepreneur-ready communities.
- Over 250 Frequently Asked Questions (FAQs)
- Over 20 Information Briefs (2-3 page fact sheets)
- Approximately 45 Research Highlights on a variety of entrepreneurship-related topics
- Monthly Webinars have been offered in 2008 and 2009.
- Monthly publicity through the “E2: Energizing Entrepreneurs Newsletter.”

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- Four Regional Entrepreneurship Resource teams tailor resources to specific audiences in each region, i.e. for Native American entrepreneurs in the North Central and Western regions.
- In the fall of 2008 a new mini-grant competitive program was launched to offer Extension educators \$3,000 to implement one of the new e-Commerce curriculum products.

Outcomes:

- The CoP was featured in the national “eXtension Launch Celebration” at the 2008 USDA Agricultural Outlook Forum.
- Website analysis shows monthly website visits in the thousands.
- As of 2009, 25 Core Team Extension professionals have become highly proficient in the use of Wiki, Moodle, and other internet technology skills.

Youth Entrepreneurship Symposium (YES)

This symposium was funded by conference sponsorships and fees.

Financial, Human, and Social Capital

In 2008, the Northeast Regional Rural Development Center, in collaboration with the other 3 RRDCs conducted this symposium which focused on youth entrepreneurship best practices, research findings, and future program development. The goals were to develop and expand social capital among youth entrepreneurship educators and form a “breakthrough” project that was collaboratively developed and represented best practices.

Outputs

- Conference Proceedings were published by the Northeast Regional Rural Development Center.
- A webinar focused on Youth Entrepreneurship was held.

Outcomes:

- Entrepreneurship Teams in the 4 USDA regions have integrated youth entrepreneurship into their programming and into the Community of Practice.
- Extension professionals have greater resources to work with youth.
- Youth have greater resources to encourage and develop entrepreneurial activities.
- The youth component has added value to the broader eXtension CoP

e-Commerce Extension Initiative.

2003 Congressional appropriation; external funding of \$632,657 and \$236,413 secured by the SRDC

Human, Social, Financial, and Cultural Capital

This initiative builds capacity among Extension educators to deliver science-based outreach e-commerce programs and provides easily accessible educational resources to people across the United States. Activities are coordinated by the Southern Rural Development Center (SRDC) in partnership with the other three RRDCs.

Outputs:

- Five on-line training sessions were offered as a web-based series.
- Five new e-commerce curricula were produced to help communities develop IT Strategic Plans, small rural retail and hospitality businesses become more competitive, and increase rural food retailing through the internet. Additional new curricula for web-based training were developed in electronic retailing, lessons for small rural businesses, and global e-commerce.
- Resources were specifically tailored and developed for the Hispanic community such as Spanish language e-commerce curricula, and resources for businesses to tap the Hispanic marketplace.
- Over the past 5 years, SRDC has invested \$902,158 in competitive grants. In 2007 five grants were awarded: “Guarding Against the Potential: Security and Back Office Concerns;” “Comercio Electrónico: Developing A Culturally Appropriate Spanish Language E-Commerce Extension Curriculum;” “A Guide to Global eCommerce;” “e-Commerce Professional Development: Bringing Educators to the Table;” and “Hispanic E-commerce Opportunities: ¡El Tiempo Ahora Está! (The Time is Now!).”

Outcomes:

- Cooperative Extension Service educators in 26 states developed professional skills and acquired new resources in e-Commerce business development and expansion.
- The Initiative is nationally recognized as a key resource for the Land Grant System of the 21st century.

National e-Commerce Conference. This conference introduced new e-commerce educational products to 65 Extension educators from 28 states.

Outputs:

- 100% of survey respondents built contacts and 60% of these have sought help.
- 61.9% report that “Electronic Retailing Selling on the Internet” was the most used curriculum resource after the conference.
- 94 technical assistance activities were provided.
- 47 programs or workshops were delivered.
- 162 communities, businesses and/or organizations were reached.
- 1,030 people have participated in programs or workshops sponsored by those taking part in the conference.
- 19 websites have been created.

Outcomes:

- 3 communities adopted e-commerce related strategies.
- 5 stakeholders reported increased sales.
- 1 new job was created or retained by applying new information from the conference.

Foundations of Practice (FoP)—Professional Development for CRED

Smith Lever 3 (b) & (c) funds

Human and Social Capital

Cooperative Extension’s Community Resource and Economic Development (CRED) professionals have traditionally offered community and economic development training programs to strengthen the skills of Extension educators to work in the field. New hires and recent retirements in CRED, an increase in joint assignments that integrate CRED work with other disciplines, and new needs from LGU stakeholders have necessitated new thinking and ideas around professional development.

These changes have stimulated new efforts, with a priority on enhancing the core competencies of all Extension professionals in the basics of community and economic development work. Strategies include reviewing and updating educational materials and resources, developing evaluation systems with common indicators, and developing new resources for changing times.

In 2004 a white paper, “Foundations of Practice,” was developed, that presented a conceptual framework for Community Development Extension core competencies. The paper was adopted at the 2005 Inaugural meeting of NACDEP – the National Association of Community Development Extension Professionals.

The NCRCRD built on the momentum that followed and developed a “Foundations of Practice” educational program, a three-component course, in “Community Development Core Competencies for Extension Professionals:” <http://srdc.msstate.edu/projects/corecomp/> What started as a North Central effort, was elevated to a national level in 2007.

Outputs:

- A total of 334 Extension professionals from 23 states have participated in FoP training.
- 15 staff/faculty have served as instructors.
- Training for the most advanced component of FoP include nine curricula, such as workforce development, economic development diversity, local government, natural resources, and civic engagement.
- An on-line interactive FoP curricula was tailored to USDA-Rural Development staff in state offices across the nation titled, “The Practice of Community Development.”

Outcomes:

- Cooperative Extension’s CRED professionals have benefitted from the Foundations of Practice training program.
- Other Extension professionals (non-CRED staff) have strengthened their knowledge and skills in basic community development work.
- USDA-RD state staff have expanded knowledge and skills in basic community development.
- Extension professionals are working toward using common indicators, logic models, and reporting tools helping CES move toward effective reporting and accounting capacity. The practice of rural development is enhanced.

Research Innovation and Development Grants in Economics (RIDGE)

USDA Economic Research Service funding of \$1.2 million over nearly a decade
Financial and Cultural Capital

Funded by this grant for over a decade, the Southern Region Rural Development Center has worked to strengthen and expand the quality of social science-based research in food assistance needs and nutrition issues for limited resource families in the South. This grant provides competitive seed funding that sparks research in these areas. The program generates science-based analyses that informs program administrators, policymakers and policy analysts and serves as a valuable aid to USDA's efforts to promote and strengthen the 15 food assistance programs that it manages.

Outputs:

- A national report, "Strengthening Our Nation's Food Assistance Programs," was published in 2007. This report was recognized by ERS as the first of its kind.
- Six documents were produced to feature the research results of this funding. They focused on: Food Access Quality and Cost; Food Assistance Challenges; Food Assistance Participation; Food Insecurity; Impacts of Food Assistance Policies; Nutrition and Obesity.
- 33 Universities and Colleges in the South have benefitted.
- 57 graduate and undergraduate students have been supported.
- 26 thesis and dissertations have been completed.
- 43 book chapters and articles have been published;
- 164 researchers have been engaged.

Outcomes:

- The scientific literature has expanded, leading to better understandings of the myriad food assistance and nutrition issues facing limited resource families in the South and generally.
- Strategies for meeting the needs of the region's diversifying population have been improved.
- Federal and state food assistance policies and programs can be fine-tuned to enhance their effectiveness.
- Individuals, families, and communities benefit from improved programs based on scientific research.
- A cohort of young scholars completed professional degrees working on these issues.

Sustainable Community Innovation Grants (SCIG)

CSREES and Sustainable Agriculture Research and Education joint funding
Financial and Human Capital

Rural development theory, research, and practice have been hampered by a traditional and assumed divide between agricultural innovation and community and economic development innovation. This falsely separates rural development into two components - either agricultural or non-agricultural. To bring together these worlds of innovative thinking and program developers, the SRDC and Southern Region SARE established the "Sustainable Community Innovations

Grants” (SCIG) program, funded jointly through their programs. The goal is to “open the farm gate” and unite the worlds of community and economic development and sustainable agriculture, thereby improving the capacity for new approaches to rural development.

Eight projects were funded in 2007 to:

- help growers prepare to transition to organic production and markets;
- help African-American communities use their assets to identify sustainable development paths;
- help a rural area build market identity related to local seafood production;
- link entrepreneurs in rural areas to resources in order to meet demand for sustainably-grown food in nearby population centers and education community leaders and citizens about sustainable agriculture practices;
- spur value-added agricultural entrepreneurship through skills training, network creation, and community planning with a goal of sustainability initiatives;
- support community needs assessment and stakeholder input processes that lead to civic engagement, cultural preservation, and strategic action plans for facets of the local food system;
- convene leaders of Native American businesses and institutional settings to link Native agricultural producers with institutional markets and bring together intertribal producers from Oklahoma’s 38 tribes with Native business leaders;
- help Ogallala Commons partner with county leaders, train community development teams, and identify and work with aspiring entrepreneurs interested in local and regional food production.

A new round of competitive grants was announced 2007 to encourage proposals from organizations with a focus on entrepreneurship development, and on value-added activities that build on the agricultural and nonagricultural assets of rural communities. These include efforts to establish entrepreneurial-friendly communities that can help support and sustain value-added entrepreneurship endeavors.

Outputs:

- A special issue of 2007 of the “Journal of the Community Development Society” focused on this topic and was co-edited by SRDC and SARE staff.

New Directions

Strategic Directions for CRED

CSREES Cooperative Agreement, Formula funds, Regional Rural Development Centers

As noted above, CRED programs are essential in this period of remarkable change for community and businesses across the country. As change accelerates and socio-economic relationships become increasingly complex, CRED offers people and communities tested strategies to address diverse issues and situations. CRED professionals offer research-based information and outreach education, along with expert facilitation, to build sustainable and vibrant communities in a competitive global economy. Clear strategic directions for CRED programming nationally are now essential. A National Leadership Council for Community and Economic Development was created in 2006 to foster national dialog and planning toward a more unified voice for this area of the Cooperative Extension Service.

Outputs:

- The National Leadership Council for CRED is established with operating procedures and a leadership rotation plan.
- Three program themes have been selected for focus: building economically viable communities; renewing civic engagement; enhancing community decision making and governance.
- A Draft Strategic Directions document was developed and presented for vetting at Galaxy III.

KA 724: Healthy Lifestyles



Healthy lifestyles, health literacy, and community health planning.

Knowledge Area 724: Healthy Lifestyle

Introduction:

This area concerns activities related to healthy lifestyles, including maintenance of social, emotional, mental and physical health. The focus is on physical activity, exercise, stress management, and health-related practices including screening, immunization, and preventive care. The work in this area often involves rural Americans, population groups at risk or the underserved, such as the low-income, older adult or immigrant populations and the factors that promote or hinder healthy lifestyles in these groups. Research is concerned with development of a theoretical basis for behavior related to healthy lifestyles. Education and Extension programs are concerned with the development, evaluation, and dissemination of education programs and strategies for professionals, students, and the public.

Healthy lifestyle, health status and provision of health services are worse in rural America for almost any disease or health issue than non rural areas due to the unique aspects of rural health care in particular and rural living in general. More dependence on Medicare coverage limits access to a full range of preventive health care services and a shortage of medical providers and the failure to coordinate providers locally is common. This combined with the social-economic disadvantage of rural areas, geographic isolation, the lack of transportation and harmful lifestyle changes leads to poor indicators of health and welfare.

About one-fifth of the non-metro population has one or more disabilities, is uninsured (under age 65) or has a reported mental health disorder. Higher mortality rates and higher rates of injury and tobacco use are associated with rural living. Obesity and physical inactivity is now more common in low-income and rural populations than ever before in part due to the high cost of and limited access to nutritious foods and the lack of recreational activities. Rural residents are 12-15% more likely to be obese and less physically active than urban residents particularly, those in the South. About one-third of rural children aged 10-17 years are overweight or obese. In addition, many of these children present socio-emotional difficulties and moderate to severe health conditions at an early age. See KA 806, Youth Development for more information about Youth and Health.

Of concern too are the out-migration of young adults from and the influx of retiring baby boomers to rural areas. This has led to an older age for remaining residents and the increased demand for health and human services with a workforce specialized in geriatrics. Also contributing to rural population growth are Hispanics. They remain one of the largest and fastest growing minority groups in rural America increasing by over 3 percent per year since 2000. While the migration of many young Hispanics may offer an opportunity to revitalize some rural communities, the influx of this population brings also an increased demand for health and social services.

Whatever the population subgroup, healthy lifestyles and the health care necessary to achieve and maintain them calls for a diverse, culturally sensitive and trained workforce to promote health education as well as access to and availability of appropriate health care systems.

The Community Capitals with Application to KA 724

A general discussion of the Community Capital Framework is presented in the Section I: Portfolio Overview of this document. For the purposes of this KA, the capitals are defined as:

Human Capital considers individual characteristics and potential determined by the intersection of genetics and by social and environmental interactions. Important human capital characterizations are education, skills, health, self-esteem, and self-efficacy. Over the past 20 years workforce shortages of adequately trained personnel have posed a fundamental systemic challenge to health care for rural and low income populations. These shortages are a long-standing problem for rural communities and appear likely to continue. Two shortages related to healthy lifestyles are that of rural dentists and mental health providers. Tooth decay is the most prevalent health problem after the common cold and along with affecting what a person can eat contributes to serious health conditions, including heart disease, diabetes and respiratory diseases. Socio-emotional difficulties such as depression in older adults and suicidal tendencies and behavior problems in some children and the lack of trained personnel in mental health care make it less likely that those in need less will be treated. Increased education and training is needed so that health educators and health care providers acquire the skills and abilities needed to promote health education and provide health care in communities. This likely will instill self-esteem and self-efficacy and the desire for healthier living.

Social Capital is the interaction and social networking among individuals that occur with a degree of frequency and comfort. It fosters trust, networks or groups, and a desire to work together to improve society and has a closely observed relationship to health. In fact, social capital affects health through a variety of pathways. First the formal and informal social networks associated with high levels of social capital may help people to access health education and information, address cultural norms which may be determined to health (such as smoking, or sedentary lifestyles) and advance prevention efforts. Second, social capital may influence health through collective action to design better health care delivery system this increasing access to services. Third, the support systems associated with social capital may act as a source of self-esteem and mutual respect. While on the contrary and much of what is currently seen in rural living is the lack of social support and high levels of psychological stress as well as such chronic disease as heart disease, depression, diabetes and hypertension.

Of interest here is a study by Shultz et al (2008). She suggests that individuals with higher levels of social trust, greater associational involvement, more participation in organized interactions, more informal socializing or those who volunteer perceive themselves to be healthier compared to those with lower levels of these measures. Accordingly, a 1% increase in the social trust index for an individual increased the probability of perception to be in excellent/very good health by 1.03%. A 1% increase in the associational involvement and informal socializing index of an individual was associated with a 3.30% and a 2.32% increase in the probability of an individual reporting excellent/very good health, respectively. Access to high levels of social capital enhances an individual's ability to influence determinants relevant for future health (i.e. maintaining a healthy weight; increasing leisure time physical activity). Addressing socio-ecological factors has the potential to increase healthy behaviors and decrease the prevalence of obesity and chronic disease. However, norms of health, body weight and physical activity may

be different or more resistant to the protective effects of social capital in some population groups (American Indian, African America), accounting for some of the relative inefficiency of social capital and health outcomes in these population subgroups.

In addition, researchers have found associations between high levels of community social capital and reduced all-cause mortality rates and better self-rated health suggesting that social capital may play a role in mediating the relationship between inequality and health. This has implications for rural America with its low-income and underserved populations where income inequity may erode social relationships. Several proposed mechanisms by which social capital may contribute to better health include: family support for healthy living; diffusion of knowledge about health and health promotion; maintenance of healthy behavioral norms through informal social control; promotion of access to local health services and amenities; and psychosocial processes which provide affective support and mutual effect.

Cultural Capital determines how we perceive the world, what we expect, what we value, and what we think we can change. In a diverse community it is necessary to take time to understand each other, recognize and value cultural differences and respect and maintain traditional knowledge. For example, cultural capital influences the perception of what is healthy, attractive and desirable often making obesity prevention and treatment difficult. If a family unit is “obese” or “large” and has been for several generations or if family members never do any type of leisure time physical activity this could be perceived as the norm not requiring change despite chronic or life threatening health issues. Or, the perceived stigma of applying for and accepting Supplemental Nutrition Assistance could limit the purchasing power of a household to buy nutritious and healthy foods. It is important to recognize that society and its cultural underpinnings can positively influence the perception and acceptability of what is healthy as we consider the future work of this portfolio.

Natural Capital provides possibilities and limits to human actions. At the same time it influences and is influenced by human actions. The availability of public lands that are accessible and usable by a diverse rural population could benefit the public health of many rural Americans by setting them in motion and connecting them with nature. For example, trails can be walked or biked, ponds and lakes used for swimming, fishing or boating, and open field used for sporting events.

Built Capital includes the infrastructure that supports other capitals and has the potential to link local people together equitably. Environmental change strategies to promote physical activity and healthy living in rural neighborhoods may differ from those in urban neighborhoods due to concerns for safety and geographic and transportation issues. Despite this, rural environments need to support physical activity, access to healthy foods, and transportation to health care facilities to ensure healthy lifestyles. In addition, the availability of, access to and use of recreational facilities in rural areas may benefit healthy lifestyle indicators.

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KA 724: Healthy Lifestyle (General) Logic Model

Situation	Inputs	Activities	Outputs	Outcomes		
				Knowledge	Actions	Conditions
<p>Rural America is home to 49 M people (20% of the nation's population and comprises 75% of the nation's land). Rural areas have fewer environmental supports to healthy lifestyle than do non rural areas to include: inadequate number of sidewalks & streetlights & limited access to nutritious foods and recreational facilities.</p> <p>Rural Americans have poorer indicators of health and welfare: higher mortality rates and higher rates of injury and tobacco use; more socioeconomic difficulty, and increased incidence of moderate to severe physical health problems.</p> <p>Rural residents are 12-15% more likely to be obese than urban residents and less physically active as well.</p> <p>Therefore, it is extremely important that diverse rural areas remain vibrant and healthy through health education and access to appropriate health care systems and associated environmental supports.</p>	<p>Funding Sources:</p> <ul style="list-style-type: none"> - Federal Gov't. Competitive Grants Formula Funds Special Grants - State Gov't. Funds to Match Federal Dollars -County Gov't. Funds to Support County Programs, Offices & Staff -Private Funds Foundations Corporate Individuals -In-kind Resources Space, food, transportation, etc. <p>Human Capital:</p> <ul style="list-style-type: none"> -Federal, state & county program and administrative staff - Grantees - Stakeholders - Volunteers -Citizens (adult & youth) -Community Leaders -Business & Industry 	<p>Research (Basic & Applied):</p> <ul style="list-style-type: none"> -Hatch & Evans Allen Projects -Multi-state Projects -Program Evaluations -University Funded Research <p>Education:</p> <ul style="list-style-type: none"> -Formal college instruction -Post-secondary degree/certificate programs -Fellowships, scholarships, internships, service learning -Collaborative health education to reach diverse audiences <p>Extension:</p> <ul style="list-style-type: none"> -Dissemination of information & knowledge -Educational programs tailored to meet individual & community needs -Professional development opportunities for staff -Developing collaborations <p>Integrated:</p> <p>Programs that combine teaching, research, and/or Extension to improve communities, the lives of people and/ or policies.</p>	<ul style="list-style-type: none"> -New knowledge -Print, on-line, & technology based information -Extension and Educational programs -Participants reached -Students graduating in certificate/degree programs in health and allied health sciences -Collaborations established -Public and private support -Communities reached -Vital inclusive communities -Entrepreneur & economic development programs 	<p>Participants understand concepts related to:</p> <ul style="list-style-type: none"> -Family & Human Development across the life span -Consumer Decision-Making -Human Environmental Issues -Nutrition & Healthy Living -Community Health Resource Planning & Development 	<p>Participants apply knowledge to improve their:</p> <ul style="list-style-type: none"> -Own lives and the families & communities in which they live -Consumer Decisions to support healthy lifestyles - Environmental conditions & interventions -Nutrition & health -Community living conditions & economic vitality 	<p>Communities will enjoy the benefits of healthy ecosystems, vital economies, and social well-being through investments & improvements in:</p> <ul style="list-style-type: none"> -Human Capital <ul style="list-style-type: none"> *Health educators and health care providers have required skills and abilities -Social Capital <ul style="list-style-type: none"> * Family support for healthy living * Diffusion of knowledge about health * Promotion of access to local health services -Natural Capital <ul style="list-style-type: none"> * Availability and support of public lands for recreation -Cultural Capital <ul style="list-style-type: none"> * Society positively influences the perception and acceptability of what is healthy *Availability of culturally competent and affordable care -Built/Infrastructure Capital <ul style="list-style-type: none"> * Environments support physical activity, access to healthy foods, and transportation to health care facilities

Assumptions – When armed with appropriate research-based information from the nation's land-grant colleges, people have the ability to solve their own problems, improve their health and well-being, and strengthen the rural communities in which they live. Through federal financial assistance and national program leadership CSREES provides research, education, and Extension programs that improve the lives of individuals & the communities in which they live.

External Factors - Financial, legislative and policy constraints; diminishing resources and staff at land-grant institutions; changing priorities and needs; demographics; socio-economic conditions; and human and natural disasters are among the external factors impacting research, education, and extension activities and the degree to which personal and community conditions can be improved.

In 2008, 19 projects (5 NRI; 3 Special Grants; 8 Other Extension Grants; 1 3D Grant; and 2 Other Grants) included KA 724 as a classification code. Many of the projects had outcomes that addressed two or more of the capitals with the human and social capitals taking the lead. Three project summaries follow:

Cooperative Extension System - Results

Healthy Aging: Rural Health and Safety Education

(KA 724=80%; KA 801=10%; KA 802=10%); Other Extension Grant

Human, Social, and Cultural Capital

This pilot project is designed to communicate, teach, and demonstrate the benefits of good nutrition and physical fitness for healthy aging in Guam's Mananmko. Nutrition and fitness workshops were conducted bi-weekly over a 6 week period at three designated senior citizens centers. Nutrition pre and post screening were administered and blood pressure, cholesterol and glucose measured with follow-up six months after the workshops. The project team worked closely with a health and physical fitness consultant throughout the program to ensure the program delivery was executed smoothly.

Outputs:

Modified nutrition education lessons from the *Healthy Eating for Successful Living in Older Adults™* Manual and the physical fitness lessons developed from the *Theraband© First Step to Active Health* Toolkit for use in this study.

Outcomes:

- Eighty-six percent of participants demonstrated gains in skills and knowledge with a score of 9.6 out of 10 to reflect learning from the program (10=learned greatly);
- Eighty-eight percent of the participants improved in selected long-term dietary changes-- increased ability to identify and differentiate between healthy and unhealthy foods; increased use of food labels; and increased daily intake of fruits, vegetables, and water;
- Seventy-five percent of participants used the *MyPyramid* as a guide to make their healthy food choices;
- Participants reported a 100% improvement in physical fitness from primary goals set at the start of program.

Mental Healthiness Aging Initiative (MHAI)

(KA 724=100%); Other Extension

Human and Social Capital

Rural residents have significantly poorer health (including mental health) status compared to urban residents. Therefore, there is a need for a culturally-sensitive population level approach to health management of rural residents that expands on the chronic-care model. A Mental Healthiness Aging Initiative (MHAI) intervention program was created and tested in Kentucky to promote and educate County Extension Agents, community partners, and family members about the role of mental health in old age and to utilize a tool kit of mental health resources to aid with identification and management of mental health problems among elders.

Outputs:

- 196 persons (county extension agents, elderly community members and family caretakers, community health providers, faith-based community partners, and local elected leaders) participated in 14 focus forum events to provide data for the development of the MHAI intervention.
- A peer reviewed educational curriculum, Aging in Kentucky: A Healthy State of Mind, was developed and printed:
 - Aging in Kentucky: A Healthy State of Mind Facilitators Guide, Participant Handout
 - A PALS Handout, Checklist of Protective Factors for Mental Health in Aging
 - Seven Case Studies
 - Pre-test and Post-Test for Evaluation for the educational intervention
 - A Tool Box of community regional and state resources.

Outcomes:

- 2 rural community hospitals submitted and received a grant from the Foundation for a Healthy Kentucky to collaborate in providing mental health services in the counties involved in the pilot
- 10 Extension agents were trained on the MHAI curriculum, resulting in an increased knowledge about mental health in the elderly; and increased confidence in their ability to identify mental health issues and direct someone to get help also generally improved.

Research - Results

Diabetes Detection, Treatment and Prevention

(KA 703=25%; KA 724=75%); Special Research Grant

Human, Social Cultural, and Built Capital

This is a Special Research Grant that funded a project on the Hawaiian islands of Oahu, Maui and Kauai. Screenings were offered to the public at community sites to assess their risk for diabetes. Participants completed a risk assessment and consent form to have a blood sample drawn for prescreening of A1c. Those individuals with an A1c level at or above 6.0 were referred to a physician and enrolled in the 'On The Road' workshop diabetes. Additional screenings for blood pressure, microalbumin and LDL cholesterol were completed and health and nutrition education provided. The goal was to help people understand five medical tests that measure indicators of diabetes health and to provide educational opportunities for people to learn to manage diabetes. .

Output:

Adults were screened for hemoglobin A1c, a measurement of the blood glucose level, using disposable monitors and one-time use cartridges (Metrika A1cNow/Bayer A1cNow+) and a finger stick blood sample. A total of 58 screening events were held for the public and employee groups, at health fairs, shopping centers, grocery stores, community walks, community colleges, and worksites. Educational sessions on basic nutrition, basic diabetes management, and diabetes prevention were also conducted, and diabetes management and nutrition information were offered at health fairs and other informal sessions.

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Outcomes:

- 2,050 adults were screened for hemoglobin A1c, 695 had results at or above 6.0 (indicative of diabetes);
- One-third of those with a ALc > 6.0 were diagnosed with diabetes;
- Project staff established partnerships with numerous community agencies (i.e. Target Stores and Community Colleges) to reach residents in under-served areas and promote diabetes awareness.

KA 802: Human Development and Family Well-Being



Work in human development and family well-being provides an understanding of the social, cognitive, emotional, and physical development of individuals and families over the human lifespan. The focus is on family science and life cycle studies. Work in this area also provides a better understanding of family systems, family performance, and well-being over time.

Knowledge Area 802: Human Development and Family Well-Being

KA 802 Introduction:

Strong, healthy families are the foundation of American communities, and healthy human development and family well-being are shared priorities for all Americans. CSREES strengthens families through effective and widespread collaborations among federal, state, and local agencies throughout the nation. CSREES and the land-grant university partnership promote family strengthening from the perspective that strong families raise children to become responsible, productive, and caring adults. Ensuring the well-being of families requires universal access to supportive educational programs and services through strategic planning and partnerships.

Community Capitals in the Context of Human Development and Family Well-Being

CSREES' work in Knowledge Area 802 is multi-faceted. Research, education, and extension programs in human development and family well-being provide an understanding of the social, cognitive, emotional, and physical development of individuals and families over the lifespan and focuses on the development of community capitals, particularly:

- social-connections among family members and their interactions with people and organizations;
- human- family life skills and abilities to enhance their resources; and
- financial-money used for family and financial stability-investment, not consumption.

For example, significant investments are called for to build the human and social capital of rural Americans and to expand economic opportunities for earning a living wage in rural America so families can escape poverty and achieve food security (Olson, 2006).

While most American families are functioning satisfactorily or well, there are many others that are struggling to provide care and support for their children. Their challenges include balancing work and family while providing for essential needs such as housing and health care. These same American families live in a vulnerable context: the social safety net in their communities and states has eroded as states continue to grapple with a fiscal crisis and the effects of a national deficit. These burdens place an added disadvantage on children and families living in poverty (National Assembly of Health and Human Services, 2004).

Poverty encompasses more than insufficient income – it represents a lack of access to health care and decent paying jobs, inadequate education and poor nutrition (Children's Defense Fund, 2004). Families need access to reliable resources and credible information to make informed decisions that affect their stability.

Haddock, 2005 states that one of the most important and often unmet needs of families is for reliable, relevant information on topics that strengthen family relationships. Cooperative Extension and family scholars and practitioners are well equipped to provide workshops to the public, because they have access to current family research, have been trained to disseminate information in a holistic and developmentally appropriate manner, and have access to large numbers of families.

Morgan (2001) asserts that the quality of social capital within families is hypothesized to have a positive relationship to their social connections to external systems such as educational, work place, civic, social, and religious organizations in their social environment--increasing social capital in families should expand their resources and lead to more successful outcomes for family members. For example, social capital should help children in families to experience nurturing relationships and healthy outcomes, appropriate parent roles, interdependent living across the generations and other desirable family outcomes. Morgan states that several decades ago, economists started to think more explicitly of skills and education as another form of capital: human capital. More recently, social scientists have observed that social networks can also have powerful effects on the level and efficiency of production and well-being, broadly defined, and they have used the term social capital to refer to these effects (Helliwell and Putnam, 2004).

Within KA 802, the Community Capitals framework provides a contextual understanding of family systems, family performance, and the overall well-being of families in society. This Knowledge Area is integrated with the CSREES and USDA goals supporting the improvement of quality of life in rural areas. Because it encompasses family life from an ecological perspective KA 802 intersects with all Community Capitals and compliments and is integrated with a wide variety of KAs in the CSREES strategic plan.

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KA 802: Human Development and Family Well Being Logic Model

Situation	Inputs	Activities	Outputs	Outcomes		
				Knowledge	Actions	Conditions
<p>The effects of socioeconomic disadvantage on children and youth are serious and merit action.</p> <p>Improving outcomes for children and youth requires strengthening families so they consistently provide the fundamentals for child and youth development.</p> <p>Families do better when they live, learn, and work in thriving and supportive communities.</p> <p>Problem-focused and piecemeal responses in the past have achieved only marginal changes in child and youth wellbeing.</p> <p>Culture and systemic change are necessary to achieve a substantial improvement in outcomes for children and youth.</p> <p>Growing diversity in American families has increased the need for targeted family strengthening programs</p> <p>Research, education & extension programs can provide families with the skills needed to make informed choices that enhance quality of life</p>	<p>Federal: Competitive & formula grants, & Special grants, SBIR totaling \$70 million for 2002-2007</p> <p>State/ local CSREES Public/ Private foundations</p> <p>CSREES NPLs Federal partners University Admin. & Faculty/ Researchers Extension Practitioners Educators Paraprofessionals Volunteers Advisory Groups Stakeholders Community organizers & leaders</p>	<p><u>Research Activities:</u> Partnership Pilot Projects Community Assessments Training Research Hatch & Evans Allen Program Development & Evaluation Rural Health Grants Special Military Programs Research</p> <p><u>Educational Activities:</u> Family Studies / Science Programs Aging & Child Care Centers Human Ecology Depts Family Life Centers Human Development Programs Undergraduate and Graduate Fellowships, scholarships, internships and service learning</p> <p><u>Extension Activities:</u> Curriculum development and training Direct & indirect dissemination of human development knowledge to target audiences Outreach and professional development Collaborative partnerships</p> <p><u>Integrated Activities:</u> Integrated research, education & extension activities focused on family science</p>	<p>New fundamental or applied knowledge</p> <p>Publications</p> <p>Practical knowledge for policy and decision-makers</p> <p>Information, skills & technology for individuals, communities and programs</p> <p>Participants reached</p> <p>Students graduated in family sciences</p>	<p>Increased knowledge among individuals & families about:</p> <p>Healthy communication and relationships</p> <p>Social & life skills necessary to make informed choices</p> <p>Effective parenting practices to promote the growth & development of children</p> <p>Self-care, accessing community resources, & care giving for children, elders, or people with disabilities</p> <p>Supportive community services (parenting, child care etc.)</p> <p>Parents & child care workers of high-quality, education, & developmental experiences for children & youth</p> <p>Factors enhancing a healthy balance between work & family life</p>	<p>Increased:</p> <p>Skills to form & sustain healthy relationships</p> <p>Enrollment in education & development opportunities</p> <p>Demand for & availability within the community of high-quality child care</p> <p>High-quality education & development opportunities</p> <p>Adoption of policies & practices among employers to support work/ life balance</p> <p>Use of supportive community services, reduced stress, & improved morale</p> <p>Improved family functioning, communication, social, & life skills</p>	<p>Human/Social/Financial Capital:</p> <p>Healthy, well functioning families</p> <p>Healthy relationships</p> <p>School readiness for children</p> <p>More communities with critical mass of resources, supports, & positive parenting role models</p> <p>Preparedness for stressful life events</p> <p>Better work place productivity, reduced costs, & profitability</p> <p>Lower rates of family violence; divorce; child abuse; neglect</p> <p>Fewer children in foster care</p> <p>Improved supports for child care, self-care, disability, & elder care programs</p>

<p>Assumptions - Individuals and families can gain the knowledge and skills needed to enhance quality of life. These are not innate, they must be learned. What impacts one family member impacts all members of the family system. The social and financial costs of unhealthy individuals and families is a major societal burden that can be prevented.</p>	<p>External Factors - Legislative and policy parameters; changing national priorities and needs; demographics; socio-economic conditions; and human and natural disasters are among the external factors impacting research, education, and extension activities seeking to improve quality of life in rural America.</p>
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Research - Results

Foster Care

(KA 802= 50%; KA 805=50%); Hatch

Human, Social and Financial Capital

Activity

In 2006, 536 foster care children in Michigan and 20,000 nationally, aged out of foster care. Michigan Agricultural Experiment Station assessed the impact of multiple placement moves on adults who lived in foster care for at least some portion of their childhoods on educational outcomes.

Output:

Findings from this study indicate that foster care alumni experience great challenges and are resistant to building a long-term social support system. The number of placements a foster care alumnus had correlated strongly with difficulty in forming supportive relationships into adulthood. The length of time a young person spent in care was also a predictor of difficulty in forming supportive relationships in adulthood. These preliminary results are the first of their kind to quantitatively define the challenges foster care alumni have in building and maintaining social relationships since leaving the foster care system.

Child Care

(KA 802= 50%; KA 805 =40%; KA 608=10%); Hatch

Human, Social and Financial Capital

Iowa State University research studies 2003-2007 examining Iowa's child care found that much of Iowa's child care is of poor or mediocre quality. Overall, 20% of all observed Iowa child care was judged to be good, 58 % was judged to be mediocre, and 22% was poor. Nearly 20% of the observed infant child care centers in Iowa offered poor quality care; none were offering good quality care. 40% of the observed family child care homes offered poor quality. Thirty-four percent of Family Child Care providers reported receiving no child care training within a 12 month period. *Child Care That Works* self study video lessons were provided to assist child care providers in meeting state licensing requirements.

Outputs:

The New Childcare Staff Orientation provided 16 hours of instruction for child care center staff. Early Childhood Environment Rating Scale (ERS) Training provided child care center directors, preschool teachers, infant toddler teachers and school-age teachers with self assessment, intensive instruction, and guidance in developing a program improvement plan to strengthen the quality of early childhood education.

Outcome:

A retrospective post-pre test survey of child care professionals (n= 1281) participating in the early childhood ERS training indicated that they were able to better identify strengths

and limitations, prioritize changes, and develop a workable plan for program improvement. This perceived change in knowledge, skills, and abilities was statistically significant indicating that the ERS training is indeed making a difference in equipping and empowering early childhood professionals to improve the quality of their child care services. Professionals (n=514) surveyed in a 3-month follow-up survey of child care quality training indicated an improvement in learning environments and teaching strategies.

Extension - Results

Job Readiness

1890 Extension Formula Funds

Human, Social and Financial Capital

Because of limited resources and reduction in staff in many rural schools in Southwest Mississippi, the school system is unable to provide job readiness programs for students to properly prepare them for the workforce. In response, Alcorn State University staff developed *The Working Class* curriculum and conducted two trainings to train area extension educators.

Output:

As a result of trainings, area extension educators in Southwest Mississippi delivered 50 educational sessions to 510 youth, and five career fairs to prepare youth in job readiness skills. According to the job readiness survey:

Outcomes:

- 45% of youth participating in the job readiness program increased their knowledge about the job search process.
- 40 % of youth participating in the program reported an increase in their communication and interviewing skills.

Alzheimer's Series

Smith Lever 3(b) and (c)

Human, Social and Financial Capital

Currently, over 16,843 people in Montana are diagnosed with Alzheimer's disease. Residents in the 50 Frontier designated counties experience obstacles in accessing care for families coping with Alzheimer's. Obstacles include: distance, terrain, climate, lack of provider and fewer available specialty services according to the MT Chapter of the Alzheimer's Association. The fastest growing population is among those over 85, some of whom are not able to live alone and require family assistance. Due to the rural nature of the state, Alzheimer's patients and their families are often isolated with few resources and supports creating greater challenges for the caregiver.

Because of this and based on feedback from community professionals/practitioners and constituents, it was decided that each topic specialist spend a week in an area of the state presenting his or her seminar in several communities. This allows more caregivers to participate in the series without having to leave their communities. The result was the development of a five-week educational series—The Alzheimer's Caregiving Series—using diverse effective adult educational strategies in two and a half hour seminars focusing on: an introduction to Alzheimer's disease; family interactions and caregiver stress; nutrition; financial planning and legal issues; and Alzheimer's proofing the home.

Program evaluations indicate that caregiver participants have significantly increased their self-confidence in caregiving and feel much better prepared for their role as a caregiver. Each year, a section of the state is targeted to receive the Montana State Extension Alzheimer's Series.

Output:

Over the past three years, 236 people have benefited from the series, 56 southeast Montanans during 2007. A manuscript on the evaluation of the series was accepted for publication in the Journal of Extension.

Outcomes:

Evaluation results indicate that participants in the series learned financial planning techniques, nutrition, home modifications and family interventions related to caring for an Alzheimer's patient. Reports also show that participants of the mini-series feel more comfortable in their caregiving role and have a greater understanding of how they can assist a loved one who is afflicted with Alzheimer's.

Because of their experiences with this mini series, 107 participants enrolled in the Powerful Tools for Caregivers course and 16 new class leaders were trained. The Powerful Tools for Caregivers course is designed to help the caregiver learn self care so they can provide care - either direct or managed to a loved one. Participants indicated the following: used action plans learned (78%), used relaxation tools taught (70%), positive self-talk (70%), used I messages (85%), are confident in helping with daily tasks (48%), can cope with the stress (63%), can do something to feel better when feeling discouraged (56%), are confident they can discuss needs and concerns related to caregiving with family members.

Safe Schools/ Healthy Students Collaborative

Smith Lever 3(b) and (c)

Human and Social Capital

Family support and involvement is one of the key factors that research documents can help children succeed in school. Youth in some areas face an overwhelming number of academic, social, and emotional risk factors. The Safe Schools/Healthy Students program conducted by Rutgers Cooperative Research and Extension Programs of Cumberland County uses science-based and promising programs to create safe and healthy schools, institute educational reform to include high standards for all students,

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expand out-of-school learning opportunities, increase community knowledge, and build infrastructure. It provides students with a coordinated and enhanced plan for activities, programs, and services focusing on healthy childhood development and preventing violence and alcohol and other drug abuse.

Key Output:

Workshops for families and their children addressed family involvement in helping children succeed, how schools can encourage more family involvement through revised policies and procedures, fostering communication, and supporting staff interactions. The workshop led to facilitation of the development of action plans in schools, and on-going support is given to the collaboration.

Outcomes:

Findings from end-of-program evaluations include: 48 percent of participants indicated they were more committed to family involvement; there was a 9 percent increase in knowledge from before and after the training regarding the role family involvement plays in children's success; and 67 percent reporting they "knew a lot about ways to encourage family involvement at my school" compared to 26 percent who reported the same prior to the training. Six months following the training, 95 percent of participants reported that the information presented was valuable. Rowan University, responsible for evaluating the Millville Regional Safe Schools/Healthy Students Collaborative federal grant found an increase in out-of-school programming (to 314 programs or a 135 percent increase), an increase in parental programs (to 147), and an increase in parental/family participation (to 11,444 parents per year by 2003/2004).

See <http://www.national4-hheadquarters.gov/about/pod-leadership/safeschools.pdf>
<<http://www.national4-hheadquarters.gov/about/pod-leadership/safeschools.pdf>>

KA 803: Sociological and Technological Change Affecting Individuals, Families and Communities



Change and social coping related to the impact of technological, demographic, and social transitions in society.

Knowledge Area 803: Sociological and Technological Change Affecting Individuals, Families, and Communities

Introduction

Acceleration in the migration of populations and rapid pace of technological change has challenged and altered the ways that families learn, earn and stay healthy in the 21st century. The social, economic and environmental side effects of the processing and consumption of food and fiber has altered the technological knowledge, skills and aspirations needed by individuals and families to sustain their families and communities in the 21st century.

While agriculture and manufacturing are major employers, economic restructuring has driven the rapid expansion of small business enterprises, the majority of which employ less than 10 persons. Due to the small scale of these enterprises, they often lack the depth of technological expertise to stay current with new demands of the market.

Different models of delivering education and training are needed to meet the challenges of rapid societal and technological change. New nation-wide telecommunications networks will offer access to improved information technology applications that citizens and their leaders need to learn to use to learn, earn and stay healthy in rural America.

However, a Pew Internet & American Life Project study (Horrigan, 2008) found that 38% of those living in rural American now have broadband at home, compared with 31% who said this in 2007, while 57% of urban residents and 60% of suburban residents have such connections. Thirty percent of dial-up users live in rural areas. This impedes access to the economic, social, and educational online resources and communications tools by rural communities.

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KA 803: Sociological & Technological Change Affecting Individuals, Families and Communities Logic Model

Situation	Inputs	Activities	Outputs	Outcomes		
				Knowledge	Actions	Conditions
<p>More than half of the U.S. rural workforce lacks the information technology skills needed to perform 21st century jobs, according to the U.S. Dept. of Commerce.</p> <p>This indicates a need to understand how best to assist citizens in rural & underserved communities in acquiring computer & telecommunications knowledge & skills.</p> <p>Additionally, efforts need to be taken to help rural residents realize that a more profitable farm & business income promotes environmental stewardship & supports quality of life for farm families & communities.</p> <p>CSREES funds programs that focus on these issues.</p>	<p>Financial Resources: (Combined Funding for 2000-2004 Totals over \$129M) Source: Current Research Information System :</p> <ul style="list-style-type: none"> - Federal - State - CSREES - Textile Companies <p>Human Capital:</p> <ul style="list-style-type: none"> - CSREES NPLs - Human Science/Textile and Apparel Researchers - Extension Specialists - Faculty 	<ul style="list-style-type: none"> - Study information technology and telecommunications related to: economic, behavioral and environmental factors that influence trends and needs for applications and use. - Development of theory-driven applications and their use to meet the needs of rural and under-served communities - Develop better evaluation tools to measure the performance of various applications and uses. - Develop knowledge of 4-H Youth Development - Internships/Field Study - Career development Workforce Preparation - Direct and Indirect dissemination - Community Engagement - Informing policy/practice 	<ul style="list-style-type: none"> - New fundamental or applied knowledge - Publications - Practical knowledge for policy and decision-makers - Information, skills & technology for individuals, communities and programs - Participants reached - Students graduated in nutritional sciences 	<ul style="list-style-type: none"> - Research identified best models for helping learners use new technology (cyber skills) - Research & practice expanded knowledge of keys to effective educational interventions - Research sheds light on effective methods for evaluating interventions - Adult & Youth learners gained knowledge related to effective use & application of information technology & telecommunication skills - As a result of interventions, individuals & communities gained awareness & skills 	<ul style="list-style-type: none"> - Rural & underserved practitioners use research & findings to develop better IT training & telecommunications approaches - Evaluation tools identified the appropriate, cost effective information technology education methods - Program participants improve their education or job performance - Number of researchers & practitioners going into information technology and telecommunication - Based on findings from research and practice, community leaders & public officials are using information to make changes. 	<p>Sustained improvements in:</p> <p>Human Capital Supply of educated workers to address unmet demand in high growth technology fields</p> <p>Social Capital & Civic/Political Capital Leading social indicators based on improved management of community facilities & services</p> <p>Financial Capital Economic conditions in rural & underserved communities</p> <p>Small rural businesses in the e-commerce supply chain.</p> <p>Natural Capital Environmental conditions</p>

<p>Assumptions – CSREES will provide support & leadership to their partners to be productive with skills to use the digital tools of the 21st century.</p>	<p>External Factors – Tight budgets at the Federal, state and community level, changing national priorities, demographics, economic conditions, information explosions, conversion to e-Government at every level, reliance on digital tools in every sector, the rapid pace of change in new releases and the use, is out racing the ability of the current systems to provide the skilled workforce to use the tools of the 21st century digital economy</p>
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Key KA 803 Outputs and Outcomes:

Research - Results

“Youthworks: Youth As Resources for Strengthening Human and Social Capital in Rural Areas” 2003-2006.

NRI (now AFRI); (CRIS #0196860)

Social Capital

The University of Illinois was funded to build partnerships between rural youth and adults through community projects and in turn, evaluate the impacts of such participation on the perception of youth and migration.

Outputs:

- Linked youth with the business communities in rural areas to identify potential work opportunities and to learn more about the community, a local directory of resources for rural youth, and greater training in team work and leadership.

Outcomes:

- There were changes in attitudes and perceptions of all the participants. Town leaders and business owners reported that an investment in teens would make the community a better place while also enhancing youth workforce preparation.
- Participating youth reported being appreciative not only for having a summer job but also for the experience of discovering opportunities in their hometown of which they were previously unaware.
- Youth in general are more likely to believe they are valued community members because of this project.

Extension - Results

Cyber Town, University of Maryland Cooperative Extension Service

Smith Lever 3 (d); (CRIS #0210221)

Human and Social Capital

This program was located at the Woodrow Wilson Community Center and targeted youth who lived in an area with limited access to technology and attended schools without an Internet connection. Community members -- teachers, parents, and business leaders -- did not want youth to fall behind, so an after-school program was initiated that taught youth computer skills. Many participants were found to lack critical reading and comprehension skills. The Cyber Town program was modified to address these issues as well.

Outcomes:

- Youth increased their computer literacy, their ability to complete homework, their reading comprehension, and how to use e-mail and the Internet.
- Program evaluators used pre- and post-testing to measure age-appropriate reading comprehension. Pre-test scores showed a mean of 52 percent with a standard

deviation of 22. Post-program mean scores were 73 percent (SD=8), an overall increase by 21 percent.

- Teachers reported that participants were better behaved and submitted more complete and accurate homework.
- Cyber Town participants also had fewer referrals to the school principal than non-participants.
- Report cards showed continual increases in GPA over a nine-month period.

Alert, Evacuate, and Shelter: 4-H Youth and Emergency Disaster Education for At Risk Coastal Zone Counties in the Southern and Eastern U.S.

National Geographic Society Education Foundation Grant

Human and Social Capital

This project was designed to enhance community preparedness. Nevada 4-H was selected to lead this program because of their experience in developing the 4-H Community Readiness Network pilot project in the western states. CSREES personnel provided technical assistance to the development and implementation of this project and developed connections between the project and EDEN (Extension Disaster Education Network).

Outputs:

- Community teams of 4-H youth, volunteers, staff, emergency management and GIS professionals and others from the affected states learned to use geospatial technology to enhance local emergency preparedness efforts in the high-risk hurricane coastal states as defined by FEMA.
- Five multi-state trainings were conducted in 2007-2008 at land-grant facilities.

Outcomes:

- Survey results immediately following trainings revealed statistically significant increases in participant knowledge gain, based on comparison of mean pre-test and post-test scores, for all survey questions. A one-year post-training evaluation revealed statistically significant increases in mean comparison as well.
- The largest knowledge gains occurred in geospatial technology. Youth and adult teams learned how to observe relationships, acquire information and map geographic representations of what they learned.
- Using what they learned, teams worked with community agencies to map optimal shelter locations and appropriate evacuations routes, further enhancing their knowledge of geographic relationships.
- Participants reported significant increases in the area of youth and adult partnerships. Prior to the training, adults appeared skeptical that youth could take leadership roles in emergency preparedness. However, following the trainings, adults recognized youth as valuable resources.
- Another critical component of the trainings was to increase awareness and participation in personal, family and community emergency preparedness activities. Impact evaluation showed that following the trainings, participants felt they could assist their communities, were more prepared and understood the issues involved, and recognized the importance of emergency preparedness.

Science at Your Service – Ag in the Classroom Meets the Need

CSREES federal budget: Agriculture in the K-12 Classroom – FY 2008 appropriation of \$983,000

Human Capital

Ag in the Classroom encourages K-12 educators to adopt science-based themes which are an outgrowth of recent scientific advances which address USDA priorities and advance Science based knowledge in our nation’s classroom. Such advances prepare students who will be better able to meet future U.S. manpower needs in science, technology, engineering and mathematics fields. These seeds of knowledge will also help excite students about careers in science that will assure a competent Science workforce for our Nation and world.

Outputs:

- In 2008, Ag in the Classroom state coordinators/educators from 40 states received training to effectively use a nutrition education program. This training will allow them to deliver the curriculum to other state and regional level educators during planned train-the trainer events.
- “The Farmer Grows a Rainbow” program was launched at the 2008 National Agriculture in the Classroom Conference and is expected to be shared with over 300 teachers from across the Nation. Training kits are available in print and web-based versions.

Outcomes: These student learning benefits cost the taxpayers less than 20 cent per student served per year.

Pilot Technology Transfer

Wisconsin, CRIS # 0207559; Mississippi CRIS # 0207358

Financial Capital

Wisconsin: The principle objective of this project is the development of a competitive, efficient, and secure manufacturing base through the mechanism of industrial extension. The program principally targets small and medium sized manufacturers in rural Northwestern Wisconsin. The project also assists agricultural producers who are moving into value added projects. The funding will continue to provide valuable industrial extension service, support the continued empirical development of an industrial extension model that incorporates Cooperative Extension Services, and integrate new manufacturing concepts into the model.

Outputs: In 2006-07, the *Northwest Wisconsin Manufacturing Outreach Center* (NWMOC)

- Served 114 companies via a completed technical assistance activity or public event.
- Provided 165 technical assistance activities, including 57 on-site events, attended by over 800 participants. In addition, 23 public educational events were sponsored that were attended by 435 participants.

Outcomes: Surveys are conducted with clients one year after the closing of their first project. In 2006-07, the NWMOC achieved client-reported impacts of over \$90 million, created or retained 229 jobs, and received a customer satisfaction rating of 4.63 on a 5-point scale (5 equals very satisfied).

Mississippi: Activities at Mississippi State are focused on research, extension and education efforts that result in more efficient and economical processes for agriculture and natural resources management. Specifically, these activities seek to integrate new techniques and capabilities, based on using geospatial technologies, into agricultural management information systems. Agricultural production systems must better utilize precision management technologies in order to enhance economic competitiveness and improve environmental quality. This project is designed to use grower/producer input regarding technique and technology gaps and develop a comprehensive research and educational program that addresses key needs in site-specific management of agriculture.

Outputs:

- In 2006-2007, two pod-casting training sessions were held for 24 agents and specialists.
- At least 5 one-time pod-casts were developed as a result of these sessions.
- Several GIS/GPS training sessions were held during the year primarily utilizing ArcGIS from ESRI. At least 5 county governments participated in multiple training sessions.
- All county offices are now connected by high capacity connections which allow the use of distance education.
- Use of the distance education system almost doubled in 2006. As new interactive video classroom sites have become available, more training for personnel utilizing these sites has been provided. In 2006, 121 hands-on information technology related workshops involving 1,178 people and 456 hours of instruction were conducted for clientele and producer groups in Mississippi.
- Eighteen (18) hands-on workshops involving 252 people and 56 hours of training were provided for MSUES/MAFES personnel. Two hands-on training sessions were provided for developing web-based business sites for small business owners.

KA 804: Human Environmental Issues Concerning Apparel, Textiles and Residential and Commercial Structures



Assisting consumers and professionals with issues related to housing affordability, healthy homes, sustainable housing, and indoor air quality.

Knowledge Area 804: Human Environmental Issues Concerning Apparel, Textiles, and Residential and Commercial Structures

Introduction:

Work in the area of Human Environmental Issues follows Congressional mandates as set forth in the Clean Air Act (1970), the Safe Drinking Water Act (1974), the Clean Water Act (1977), the Pollution Prevention Act (1990), the Residential Lead-Based Paint Hazard Reduction Act of 1992 and regulations issued by federal agencies. Research, education and extension work in human environmental issues concerning apparel, textiles and residential and commercial structures provides an understanding of the social, economic and design aspects of housing and the social, aesthetic and functional aspects of apparel and textiles. Work in this area provides a better understanding of the interface among producers, retailers and consumers. This work relates directly to the CSREES and USDA missions –to support the improvement of quality of life, particularly in rural America and funds are allocated to four distinct sustainable housing and environment areas: Apparel and Textiles, Healthy Housing; Energy, and Housing Economics.

This KA addresses the basic human need of protection from natural and man-made environments. USDA supports basic and applied research, education, and extension efforts to improve the protection offered by textiles, apparel, and housing. USDA supports producers, manufacturers, and consumers by supporting expansion of the range of fiber crops, finishes, fabrics, and home production materials and techniques used to make textiles, apparel and housing. If production is more efficient or more innovative, productivity, market share, and farm incomes may be increased, while better serving consumers. USDA seeks to expand the options available to home buyers and renters by supporting research to make housing more affordable, healthy and energy efficient. USDA supports efforts to minimize harm to the health of workers and consumers by reducing exposure to hazards both natural (ultraviolet radiation) and man-made (chemicals, pesticides, cigarette smoke, etc.).

This KA addresses the following community capitals: natural, human, financial, social and built capitals.

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KA 804: Human Environmental Issues Concerning Apparel, Textiles and Residential and Commercial Structures Logic Model

Situation	Inputs	Activities	Outputs	Outcomes		
				Knowledge	Actions	Conditions
<p>The environment in which we live, work and play affect human health and quality of life and well being.</p> <p>Specifically, the air we breathe in our lives, the water we drink, the products we use, even the design of our housing and the apparel and textiles we use all affect us.</p>	<p>Financial Resources (Combined Funding for 2002-2006 Totals over \$18M) Source: Current Research Information System : Federal State CSREES Textiles and Chemical Companies</p> <p>Human Capital: CSREES NPLs Human Science/Textile and Apparel Researchers Extension Specialists</p>	<p><u>Research Activities:</u> Research projects Referred journal articles Research reports and publications Master's Theses Develop new patents Create new tools Develop new processes</p> <p><u>Educational Activities:</u> Undergraduate and graduate courses Academic seminars Curriculum Reviews</p> <p><u>Extension Activities:</u> Workshops Seminars Mass Media Fairs, Shows Counseling</p>	<p>New fundamental or applied knowledge</p> <p>Publications</p> <p>Practical knowledge for policy and decision-makers</p> <p>Information, skills & technology for individuals, communities and programs</p> <p>Participants reached</p> <p>Students graduated in home environmental sciences</p>	<p>Increased awareness & knowledge concerning human environmental issues related to apparel, textiles, housing & the environment</p>	<p>Action and behavior changes as a result of knowledge about human environmental issues related to apparel, textiles, housing and the environment</p>	<p>Improved environment</p> <p>Improved health</p> <p>Improved quality of life</p> <p>Fewer injuries</p> <p>Decrease in medical expenses</p> <p>Decrease in absences from school, workplaces</p> <p>Decrease in visits to emergency rooms</p> <p>Fewer deaths</p>
<p>Assumptions - CSREES accompanies work related to human environmental issues through collaboration with partner agencies and organizations. Education will cause knowledge change leading to behavior changes and ultimately improve quality of life for individuals and families.</p>			<p>External Factors - Accidental or intentional introduction of environmental risk factors affecting health and well being. Development and acceptance of advances concerning textiles, apparel, and housing in the general population</p>			

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KA 804: Human Environmental Issues Concerning Apparel and Textiles Logic Model

Situation	Inputs	Activities	Outputs	Outcomes		
				Knowledge	Actions	Conditions
<p>The types of fabrics selected and the care and use of these fabrics during and after their use can affect the environmental health and well-being of people who wear these fabrics in their professions, especially farm and lawn maintenance workers and landscapers who work in contact with chemicals such as pesticides.</p> <p>Research has shown that those in the above professions have a higher incidence of cancers and other health issues that could be directly related to improper use and care of their clothing.</p>	<p>Financial Resources: (Combined Funding for 2002-2006 Totals over \$18M) Source: Current Research Information System : Federal State CSREES Textile Companies</p> <p>Human Capital: -CSREES NPLs -Human Science/Textile and Apparel Researchers -Extension Specialists -Faculty</p>	<p><u>Research Activities:</u> Evaluate protectiveness of apparel to Ultraviolet radiation and pesticide exposure Mediating Exposure to Environmental Hazards Through Textile Systems: Assessed the protectiveness of shirts varying in thickness and level of UVR blocking. And, investigated the protectiveness of lined gloves in defense of pesticides.</p> <p><u>Educational Activities:</u> Undergraduate and graduate courses</p> <p>Academic seminars <u>Extension Activities:</u> Train agricultural and landscape workers on proper use and care of protective materials</p> <p>Conduct field work to evaluate performance specifications</p>	<p>New fundamental or applied knowledge</p> <p>Publications</p> <p>Practical knowledge for policy and decision-makers</p> <p>Information, skills & technology for individuals, communities and programs</p> <p>Participants reached</p> <p>Students graduated in textiles and related sciences</p>	<p>Increased awareness and knowledge regarding environmental hazards associated with certain pesticides, chemicals, etc. and their interaction with fabrics</p> <p>Increased awareness of the effects of long term UV exposure and proper techniques to reduce UV exposure.</p>	<p>Improved selection and use of fabric and apparel to minimize exposure to pesticides and other chemicals, such that their clothing protects them and their families from the products they are handling and minimizes exposure to family members in their homes</p> <p>Reduced exposure to UV rays to prevent skin damage</p>	<p>Improved health among agricultural & landscape workers, and others</p> <p>Reduced incidence of cancer</p>
<p>Assumptions -Clothing and personal protective devices can help protect the health and well-being of workers exposed to chemicals such as pesticides, while improper use of clothing can increase exposure of workers and their families to chemicals such as pesticides and herbicides. and their associated health risks.</p>			<p>External Factors - Development of safer chemicals, changes in organic farming, biological pest control, reduced use of chemicals in lawn gardens (increase xeriscaping, native plant use.)</p>			

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KA 804: Human Environmental Issues Concerning Indoor Environmental and Health/Safety/Issues Logic Model

Situation	Inputs	Activities	Outputs	Outcomes		
				Knowledge	Actions	Conditions
<p>Research has shown that the quality of air in homes can be worse than the quality of air outdoors.</p> <p>The number of people with asthma increased by more than 150% from 1980 to 1988.</p> <p>Accidents in the home injure more than 6 million people each year with the most vulnerable being children and older consumers</p> <p>From 1997 to 2001, home injuries cost society an average of at least 222 billion dollars per year in medical costs.</p> <p>Healthy homes focuses on home safety and unintentional injuries, lead hazards and indoor air quality, asthma, moisture and mold.</p>	<p>Financial Resources: (Combined Funding for 2002-2006 Totals over \$18M) Source: Current Research Information System : Federal State CSREES Other Sources</p> <p>Human Capital: CSREES NPLs County Staff Extension Specialists Federal/Agency Contacts Non-profit Contacts Teachers Child Care Contacts Health Community Law Enforcement Community</p>	<p><u>Research Activities:</u> Research requests Referred journal articles Research reports Master's Thesis</p> <p><u>Educational Activities:</u> Undergraduate and graduate courses Academic seminars at universities Curriculum revisions</p> <p><u>Extension Activities:</u> - Workshops - Seminars - Mass Media - Health Fairs - Web-based Instruction - Train-the-Trainer Programs - Telephone Hotlines - IAQ Month - Radon Hotline</p>	<p>New fundamental or applied knowledge</p> <p>Publications</p> <p>Practical knowledge for policy and decision-makers</p> <p>Information, skills & technology for individuals, communities and programs</p> <p>Participants reached</p> <p>Students graduated in home environmental and related sciences</p>	<p>Increased knowledge, attitudes, and skills about healthy homes, indoor air quality, water, and energy in the home.</p> <p>Increased knowledge about asthma triggers</p> <p>Changing attitudes in health community</p>	<p>Implementing Best Management Practices</p> <p>Increased carbon monoxide detectors installed.</p> <p>Decreased number of children exposed to second-hand smoke in the home</p> <p>Increased monitoring of appliances</p> <p>Decreased levels of mold mildew</p> <p>Increased testing & mitigation for radon & lead, removing asthma triggers, adapting energy efficient practices & adapting to prevent falls</p> <p>Increased water testing and septic tank maintenance</p>	<p>Improved health & safety in the home</p> <p>More energy efficient homes with reduced energy demands & lower energy costs</p> <p>Fewer emergency room visits by youth with asthma & fewer incidents of asthma</p> <p>Lower asthma episodes for children</p> <p>Decrease in medical expenses</p> <p>Decrease in absences from school</p> <p>Fewer injuries & deaths in the home from unintentional causes</p> <p>Fewer deaths attributed to lung cancer</p>
<p>Assumptions - Education of builders, realtors and consumers leading to better choices and usage of materials, furnishings, household and other products affecting air quality and safety, as well as improvements in household care and maintenance will lead to reductions in illness, accidents and death</p>			<p>External Factors - Economic factors affecting home renovation and new development of new building materials, alternative energy, and public health interventions addressed specifically to smoking cessation.</p>			

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KA 804: Human Environmental Issues Concerning Housing Affordability Logic Model

Situation	Inputs	Activities	Outputs	Outcomes		
				Knowledge	Actions	Conditions
<p>A typical household spends 30-40% of income on housing & related expenses, the largest single item in a households budget.</p> <p>Home ownership continues to be a major goal for American families today. However, for buyers & for renters, housing costs are increasing at a faster rate than incomes.</p> <p>In the future population changes will necessitate changes in the housing to accommodate the demographics of the population, particularly the increase in the number & proportion of the elderly living in rural areas.</p> <p>The growing lack of affordable housing is one of the most critical housing challenges facing our society.</p>	<p>Financial Resources: (Combined Funding for 2002-2006 Totals over \$18M) Source: Current Research Information System: Federal: HUD, Rural Housing USDA State CSREES Other Sources</p> <p>Human Capital: CSREES NPLs and other Federal Agency contacts Housing Specialists County/Regional Staff Non-profit contacts Builders/ Realtors</p>	<p><u>Research Activities:</u> Determine the Influence of housing on children and elderly in rural communities</p> <p>Effects of Mobile Homes on Families and Children: determined the characteristics of those residing in mobile homes & identified the community effects on children living in the community</p> <p>Quality and Affordability of Housing in Rural Areas for At Risk Populations (elderly): compared the affordability and quality of housing available to the elderly in rural areas</p> <p><u>Educational Activities:</u> Undergraduate and graduate courses in housing & real estate Academic seminars Property management programs</p> <p><u>Extension Activities:</u> Workshops Seminars Home buyer/builder shows/fairs Mass Media-radio, television, newspapers, newsletters Individual counseling</p>	<p>New fundamental or applied knowledge</p> <p>Publications</p> <p>Practical knowledge for policy and decision-makers</p> <p>Information, skills & technology for individuals, communities and programs</p> <p>Participants reached</p> <p>Students graduated in related fields</p>	<p>Increased awareness and knowledge about housing possibilities and options</p> <p>Determine that rural trailer parks are likely to segregate families and children. Ttrailer parks are less likely to have access to enhancement resources</p> <p>Determine that the overall quality of housing for the elderly is higher than expected and those who relocate are more likely to report an increase in housing quality.</p>	<p>Improve matches between home buyers/ renters incomes' and housing they buy/rent</p> <p>Improve home maintenance practices</p> <p>Improve tenant and landlord relations</p> <p>Increase the number of programs identifying and meeting the housing needs of at risk populations.</p>	<p>Increase use of housing options</p> <p>Reduce mortgage default rates, especially among first time and minority home buyers</p> <p>Increase stock of homes built using universal design techniques, including features enabling elderly to "age in place"</p> <p>Decrease rate of preclosures</p> <p>Workforce stability</p> <p>Increase resources available to at risk populations.</p>
<p>Assumptions - People are motivated to learn, knowledge changes, leads to behavior change, behavior change leads to condition change.</p>			<p>External Factors - Institutional commitment, cooperation with partners, economic, political, social and demographic conditions remain stable</p>			

Key KA 804 Outputs and Outcomes:

Extension - Results

Healthy Homes

Smith Lever 3(b) and (c)

Human and Financial Capital

Most people spend approximately 90% of their time indoors. This can be highly harmful to their health if we consider the scientific evidence, indicating that toxic levels in air in interiors can be higher than the outdoor air in even the largest and most industrialized cities. The lung is the most common site of injury by airborne pollutants.

The Healthy Homes program is focused on training with housing related health and safety issues including lead hazard control, indoor air quality, fire and disaster safety, mold reduction, pesticides, drinking water and asthma prevention.

Outputs: In the area of indoor air quality (IAQ), 191 youth completed the short course Youth Protect the Air You Breathe. Of these, 133 participated in the IAQ 4-H competitions. In 2007, 35 states reported training 8,017 professionals and 1, 433, 871 consumers in healthy homes related subject matter. Over 20,000 copies of the “Help Yourself to a Healthy Home” booklet in five different languages were distributed in the same year.

Outcomes: As a result of a sample of participants with the outreach efforts, 122 people limited and used more wisely the products with volatile organic compounds (VOCs); 163 promoted not smoking, and 172 detected and removed biological hazards in their homes. Two hundred and seventy-two (272) adults learned about indoor air contamination through short courses, seminars, and home assessments. Of these, 117 improved/corrected moisture levels in the home, 207 detected and controlled indoor air contaminants in their homes, 150 took steps to check/maintain/correct combustion appliances, 202 detected and removed biological hazards, and 72 took steps to maintain the air conditioning equipment in optimum conditions.

Home Energy

Human and Financial Capital

Energy consumption is expected to increase 59% over the 1999 level by 2020. Rising energy costs impact a households ability to pay for basic needs. Low-income households pay on average 19.5% of their income for energy. Homes and buildings account for 36.4% of the total U.S. primary energy consumption. This program will be developed through a new eXtension Community of Practice (COP) so that consumers can easily obtain the most reliable and up to date information to make decisions regarding home energy.

Expected Output: Over sixty housing, environment and energy specialists and educators including extension staff, staff from federal and state energy related agencies and non-profits will work to develop the content pages for the eXtension Home Energy Community of practice including FAQ's.

Expected Outcome: As a result of using the eXtension Home Energy materials, consumers and housing related professionals will increase their knowledge and make better decisions to use energy more efficiently in their homes by purchasing more energy efficient equipment and appliances such as energy star appliances, materials (such as insulation) and appliances, making changes in existing homes; and evaluating energy options for their homes including passive and active solar energy, wind generators, heating and cooling equipment and window replacements.

KA 805: Community Institutions, Health, and Social Services



The development, quality, and functioning of community institutions and social services. Work in this area enhances the scope, scale and effectiveness of public and private community institutions and services, including emergency preparedness and response, and public safety.

Knowledge Area 805: Community Institutions, Health, and Social Services

Introduction:

This area addresses the development, quality, and functioning of community institutions, health and social services. Work in this area enhances the scope, scale, and effectiveness of public and private community institutions relevant to health and social services, including disease prevention and management, emergency preparedness and response, and community and public safety.

The research, education, and extension missions have health and well-being as overarching themes in the agricultural sciences, human sciences, youth development, community resource development, and public policy arenas. The health area addresses a broad array of issues including home, farm, and community safety, wellness and fitness, and disease prevention and management. Health programs have clear linkages to nutrition research and education, food safety, AgrAbility and farm safety, pesticide safety, air and water quality; all programs administered by this agency.

Health impacts every aspect of individual and community well-being. Although as total national health care spending has risen to \$2.4 trillion health disparities still exist and 46 million uninsured Americans under the age of 65 have very limited access to medical care. A large number of the uninsured are children. Inadequate healthcare can clearly undermine worker productivity and thus the economic power of American communities.

The health care sector, a vital contributor to local economy, especially in rural areas, is being compromised by hospital closings, decreases in services, and shortages of medical service providers. Also, health status and provision of health services are worse in rural areas than in non rural areas for almost any disease or health issue due to the unique aspects of rural health care in particular and rural living in general. More dependence on Medicare coverage limits access to a full range of preventive health care services and a shortage of well trained medical providers and the failure to coordinate providers locally are common. This combined with the social-economic disadvantage of rural areas, geographic isolation, the lack of transportation and harmful lifestyle changes leads to poor indicators of health and welfare. In addition, many low income and rural Americans do not seek or achieve adequate health care due to their social belief systems and the lack of culturally competent care and available and affordable health and social services.

Nationwide, health care costs continue to rise while the health care system continues to become more complex. Reasons for rising health care costs include technological advances, new drug therapies, malpractice costs, and a growing aging population. But a less recognized reason is the costs incurred by patients who do not understand medical information, their health care system, and their health provider's instructions.

The public is assuming more responsibility for understanding medical information, acute and chronic disease self-care, medication directives, the health care system, and health provider information. Many are faced with low health literacy. Health literacy is the

ability of individuals to obtain, interpret and understand basic health information and services and to use such information and services to make appropriate health decisions. Limited understanding is a challenge for people of all ages, races, cultures, income and educational levels. Half of adult Americans struggle with understanding common health care information, such as prescription drug instructions, test results, insurance forms, and chronic disease self-management. This has resulted in a knowledge and behavior gap between the medical and public health innovations and the delivery of day-to-day information and services the public needs to lead longer and healthier lives.

In the context of this KA, definitions and background related to the Community Capital include:

Human Capital- considers individual characteristics and potential determined by the intersection of genetics and by social and environmental interactions. Important human capital characterizations are education, skills, health, self-esteem, and self- efficacy. Over the past 20 years workforce shortages of adequately trained personnel have posed a fundamental systemic challenge to rural health care. These shortages which are likely to continue are a long-standing problem for rural communities as they weaken health care delivery and the quality of health care services. Rural areas often cannot achieve the economies of scale necessary to support specialty service providers and are also vulnerable to workforce shortages because of small population size and scale in that the loss of a physician or nurse practitioner can have profound effects on the community's ability to ensure reasonable access to care.

One shortage of immediate concern is that of mental health providers. Socio-emotional difficulties such as depression in older adults and suicidal tendencies and behavior problems in some children and the lack of trained personnel in mental health care make it less likely that those in need less will be treated. In particular, the higher proportion of older adults in rural areas presents added challenges for rural communities where older adults are less likely to report depressive symptoms. Older adults present with a complexity of issues that may disguise depression or is a secondary condition associated with a chronic illness or disability. Many times, they are reluctant to seek care even when a mental health provider is present due to the common misconception that mental and behavioral health problems are unrelated to physical health and that there is a associated cultural stigma to seek health for these problems. The work of this portfolio needs to consider a variety of factors when addressing mental health prevention to include stressful economic conditions, extreme distances to resources, limited choice in resources, and lack of anonymity.

Human capital is essential to community institutions, health, and social services for ongoing care as well as in times of disasters. The involvement of community support systems, the sharing of resources and the use of health provider and safety networks are critical. This requires finding ways to cultivate and train community leaders to facilitate collaboration, and to guide and develop community efforts and to adequately train health care, social service providers and first responders.

Social Capital- encompasses the norms and networks that facilitate collective action. It is the interaction and social networking among individuals that occur with a degree of frequency and comfort. It fosters trust, networks or groups, and a desire to work together to improve society and has a closely observed relationship to health. In fact, social capital affects community institutions, health and social services through a variety of pathways. First the formal and informal social networks associated with high levels of social capital may help people to access health education and information, address cultural norms which may be determined to health and advance prevention efforts. Second, social capital may influence health through collective action to design better health care delivery system this increasing access to services. Third, the support systems associated with social capital may act as a source of self-esteem and mutual respect. Social capital is related to improved health care access because the concepts of social capital --trust among citizens, reciprocity, social networking, and civic engagement-- likely improve the functioning and efficiency of community social institutions. Also, as understanding of the social aspects of human health has deepened, community institutions have assumed more responsibility for improving the health status of citizens by initiating community care networks and advancing other aspects of social capital.

Social capital may play an important role in the health of low-income and underserved populations and that of many rural residents in its influence on their use of health care services. Research by Perry et al. shows evidence of a relationship between social capital and health care experiences among low income individuals with social support inversely predictive of barriers to health care whereas psychosocial interconnectedness emerged as a significant predictor of satisfaction with care. Individuals living in a community with high social capital may provide one another with greater instrumental and psychosocial support those than living in a community with low social capital; likewise the community with high social capital may have a higher level of interconnectedness and trust which may reduce barriers to health care.

These concepts are also important in times of community emergencies or natural disasters. During such times the social system is the logical and viable base for all stages of emergency action and the community has a collective responsibility to act quickly. With the increased incidence of natural and man made disasters and national emphasis of homeland security and emergency preparedness, KA 805 offers the opportunity to look at the community health and social systems and how they might be used and modified to deal with disasters. Areas of research could include: improved health care access; more humane, efficient, better coordinated, and broader health care systems; improved functioning and efficiency of community social institutions; and the ability to move back to the normal as quickly as possible in emergency planning and implementation.

Cultural Capital determines how we perceive the world, what we expect, what we value, and what we think we can change. In a diverse community it is necessary to take time to understand each other, recognize and value cultural differences and respect and maintain traditional knowledge. Cultural influences also affect the reasons individuals do not seek or achieve care—belief systems, stigma, lack of culturally appropriate care and limited

accessibility and affordability of public health and health care services are reasons why an individual does not attempt to assess the healthcare system. In addition, social-cultural factors in some communities, such as mistrust of government, reluctance to seek outside assistance and a priority on privacy, in tension with the difficulty of preserving anonymity in small (rural) communities, may reduce the likelihood that rural residents will report problems or seek report even when effective health care systems are in place. Thus, the availability of culturally competent and affordable care with information on how to use them in conjunction with positive belief systems is key to people seeking or achieving health care and social services.

Built/Infrastructure Capital - enhances other community capital and potentially link local people together equitably. Community institutions, health and social services play a pivotal role in developing and sustaining vibrant rural communities because these services allow communities to maintain the well-being of their residents. Communities must be well equipped in order to deliver effective and comprehensive health and social services and require environments supportive of operational and accessible community health systems. In addition, for disasters and homeland security efforts, there is the need to build disaster resistant communities. This consists of identifying local hazards and strengthening physical infrastructure as well as understanding how physical capital-infrastructure and housing might be constructed.

In 2008, 20 projects (2 NRI; 9 Special Grants; 1 Other Extension Grants; 5 3D Grant; and 3 Other Grants) included KA 805 as a classification code. Many of the projects had outcomes that addressed two or more of the capitals with the human and social capitals taking the lead. Two project summaries follow the Logic Model.

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KA 805 Community Institutions, Health and Social Services (in General) Logic Model

Situation	Inputs	Activities	Outputs	Outcomes		
				Knowledge	Actions	Conditions
<p>Rural America is home to 49 M people (20% of the nation's population and comprises 75% of the nation's land). Health status, health care and social services are worse in rural America for almost any disease, health, or social issue than in non-rural America. Many rural Americans do not seek or achieve adequate health care due to their social belief systems, lack of culturally competent care & limited accessibility, availability and affordability of health and social services. Geographic isolation of rural communities makes it difficult to attract health services and providers. Transportation limitations are an obstacle to many factors related to health care and services. Community resources are limited to support public health education and community institutional infrastructure. Thus, it is extremely important that diverse rural areas remain vibrant with access to assets to support operational and accessible community institutions, health and social services.</p>	<p>Funding Sources: - Federal Gov't. Competitive Grants Formula Funds Special Grants - State Gov't. Funds to Match Federal Dollars -County Gov't. Funds to Support County Programs, Offices & Staff -Private Funds Foundations Corporate Individuals -In-kind Resources Space, food, transportation, etc.</p> <p>Human Capital: -Federal, state & county program and administrative staff - Grantees - Stakeholders - Volunteers -Citizens (adult & youth) -Community Leaders -Business & Industry</p>	<p>Research (Basic & Applied): -Hatch & Evans Allen Projects -Multi-state Projects -Program Evaluations -University Funded Research Education: -Formal college instruction -Post-secondary degree/certificate programs -Fellowships, scholarships, internships, service learning -Collaborative health education to reach diverse audiences Extension: -Dissemination of information & knowledge -Educational programs tailored to meet individual & community needs -Professional development opportunities for staff -Developing collaborations Integrated: Programs that combine teaching, research, and/or Extension to improve communities, the lives of people and/ or policies.</p>	<p>--New knowledge -Print, on-line, & technology based information -Extension and Educational programs -Participants reached -Students graduating in certificate/degree programs in health and allied health sciences -Collaborations established -Public and private support -Communities reached -Vital inclusive communities -Entrepreneur & economic development programs</p>	<p>Participants understand concepts related to: Family & Human Development across the life span -Consumer Decision-Making -Human Environmental Issues -Nutrition & Healthy Living - Community Health Resource Planning & Development</p>	<p>Participants apply knowledge to improve their: -Own lives and the families & communities in which they live -Consumer Decisions to support healthy lifestyles - Environmental conditions & interventions -Nutrition & health - Community living conditions & economic vitality</p>	<p>Communities will enjoy the benefits of healthy ecosystems, vital economies, and social well-being through investments & improvements in: -Human Capital *Health educators, health care providers, and first responders have required skills and abilities -Social Capital * Improved health care access * Improved functioning and efficiency of community social institutions *Efficient and effective response to natural and man made disasters -Cultural Capital * Belief systems positively impact why people seek or achieve health care * Availability of culturally competent and affordable care -Built/Infrastructure Capital * Environments support operational accessible community health systems</p>
<p>Assumptions – When armed with appropriate research-based information from the nation's land-grant colleges, people have the ability to solve their own problems, improve their health and well-being, and strengthen the rural communities in which they live. Through federal financial assistance and national program leadership, CSREES provides research, education, and Extension programs that improve the lives of individuals & the communities in which they live.</p>			<p>External Factors - Financial, legislative and policy constraints; diminishing resources and staff at land-grant institutions; changing priorities and needs; demographics; socio-economic conditions; sky-rocking health care costs, health disparities among rural population groups; and human and natural disasters are among the external factors impacting research, education, and extension activities and the degree to which personal and community conditions can be improved.</p>			

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Key KA 805 Outputs and Outcomes:

Extension - Results

Smart Aging: Health Futures

KA 805=100% Other Extension Grant

Human Social and Financial Capital

The Rural Health and Safety Education grant, “Smart Aging: Health Futures” identified community resources and deficits supporting the health and health care needs of a community; engaged communities in grass root efforts to improve the health care access of rural elderly populations; initiated a number of health promotion activities targeted to rural aging populations, their families and associated support systems; and recruited and trained a cadre of lay health education volunteers to develop local programs. Emphasis was placed on four Mississippi counties with 15,000 plus residents age 65 and older.

Outputs:

- Formation of community action groups and their training in “Moving from Talk to Action” for use in the education of senior audiences;
- Training of *Healthy Futures* Volunteers to deliver health promotional messages to senior audiences on a variety of topics of particular interest and concern to that demographic;
- Dissemination of 8,000 “Messages of the Month,” health-related short, printed messages of interest to seniors throughout the four counties. Messages distributed to a variety of businesses and organization frequented by seniors (i.e., churches, hair salons, nursing homes, libraries, funeral homes, physician’s offices, hospice organizations, local Medicaid offices, Area Agencies on Aging, and banks);
- Program community reports printed for each of the 4 counties for distribution to various stakeholders in the targeted communities;
- Article was prepared for the Mississippi Rural Health Association *Crossroads* newsletter. <http://msrha.org/files/mrhanewsletterOCT08.pdf>

Outcomes:

- The *Healthy Futures* Volunteers provided health messages with over 400 individuals, clocked 138 hours at a value of about \$2,000 (if compensated);
- The *Healthy Futures* 410 Volunteers have been trained to deliver health promotional messages to senior audiences. Topics include: Alzheimer’s disease, Heart Attack and Stroke Warning Signs, Self-Care, and Breast Cancer Awareness.



KA 806: 4-H Youth Development



Programs that provide positive environments in which young people can develop competence, confidence, connections, character, compassion and contributions

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Knowledge Area 806: 4-H Youth Development

4-H Youth Development is Knowledge Area 806 in the CSREES classification system. A primary source of support comes from Smith-Lever 3(b) & (c) formula funds. KA 806 compliments and is integrated with a number of KA's in the CSREES strategic plan, including KA 802 Human Development and Well Being; KA 703, Nutrition Education and Behavior; 704, Nutrition and Hunger; and 803, Sociological and Technical Change Affecting Individuals, Families and Communities; as well as others.

This KA addresses program development for youth, and the preparation and engagement of young people. Youth development is the natural process in which young people grow and develop. "While it occurs through youth's daily experiences with people, places and possibilities, it is far too important to be left to chance" (National 4-H Leadership Trust, 2002). Often, when young people lack positive environments and guidance, they turn to risky and negative behaviors, subsequently diminishing their potential as productive citizens.

4-H programs, with over a 100 year history, provide these positive youth development experiences to diverse populations through a large and complex system. The 4-H program combines the cooperative efforts of almost 7 million youth; the National 4-H Headquarters in the Cooperative State Research, Education and Extension Service (CSREES) of the US Department of Agriculture; over 500,000 volunteer leaders; 2,400 professional staff; Cooperative Extension Services (CES) at 106 state land-grant universities; state and local governments; private-sector partners; state and local 4-H foundations; and the National 4-H Council. 4-H programs are conducted in the United States, Puerto Rico, Virgin Islands, Guam, American Samoa, Micronesia, and Northern Mariana Islands. 4-H-type programs are also international, with youth in more than 80 countries in similar independent programs.

4-H is the flagship youth development program of the U.S. Department of Agriculture. 4-H is also the world's largest non-formal educational program. It reaches youth through a variety of delivery systems such as 4-H clubs and other types of community-based youth development programs, after-school and out-of-school time programs, resident and day-camps and school enrichment programs.

4-H is built on the concept of four-fold development and service to others as evidenced in the 4-H pledge:

*I pledge my Head to clearer thinking,
My Heart to greater loyalty,
My Hands to larger service, and my
Health to better living
for my club, my community, my country, and my world.*

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More recently, the 4-H pledge can be paralleled with research in the youth development field. Lerner (2005) states that the positive youth development approach builds upon what have become known as the “Five C’s”: Competence, Confidence, Connection, Character, and Caring (Lerner, Promoting Positive Youth Development: Theoretical and Empirical Bases, 2005) .

Lerner (2004) goes on to say that researchers theorized that young people whose lives incorporated these Five C’s would be on a developmental path that demonstrates a Sixth C: Contributions to self, family, community, and the institutions of a civil society. In addition, young people whose lives contained lower amounts of the Five C’s would be at higher risk for a developmental path that included personal, social, and behavioral problems and risks (Lerner, Liberty: Thriving and Civic Engagement Among America’s Youth, 2004).

Positive relationships with a caring adult, a safe environment, opportunities for youth to develop mastery (building of knowledge, skills, and positive attitudes), a sense of belonging, a sense of independence, and generosity (the ability to demonstrate their new skills in public service) are essential elements of effective programming for youth. Research indicates that youth development programs addressing these components are more likely to result in healthy and happy children, who demonstrate a sense of maturity and civic engagement as adults and become stronger individuals, creating stronger families and better communities.

By offering positive, non-formal, research-based, educational experiences for youth, 4-H strives to increase the Six “C’s” in young people. As one dimension of developing these constructs in young people, 4-H has focused programming on three overarching areas: Science, Engineering, and Technology; Healthy Living; and Citizenship. Starting in 2006, the National 4-H Headquarters placed a major priority in these three areas to bring new visibility and resources to support the work. These initiatives are discussed further in the following pages.

In addition to the three program areas of focus, there are three major funding streams that support the work in this KA: Children, Youth and Families at Risk, Rural Youth Development Grants, and 4-H-Military Partnerships. These programs are also discussed in the pages that follow.

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Situation	Inputs	Activities	Outputs	Outcomes		
				Knowledge	Actions	Conditions
<p>At least 12 million (16%) of U.S. children live in poverty in rural towns, suburbs, and central cities.</p> <p>Poverty multiplies risk factors. American children are at risk for infant mortality, undernourishment school failure, abuse, neglect, crime, violence. At immediate risk for unmet needs for safety, shelter, food, and care, these children are at long-term risk of NOT becoming dependable family members, workers, and involved citizens.</p> <p>Communities need increased attractive opportunities for youth.</p> <p>Youth need to be ready for life with the competence, confidence, connection, character, caring, and contributions to self, family and community within the institutions of a civil society.</p> <p>Youth need positive Knowledge, skills and behaviors to lead fulfilling lives and to be active citizen scientists.</p> <p>From the 4-H Study of Positive Youth Development, 4-H participants had better grades, were more behaviorally and emotionally engaged and were more likely to see themselves as going to college .</p>	<p>Financial Resources: Combined Funding Local State Federal – competitive grants, formula funds, special grants Public/Private Foundations Individuals</p> <p>Human Resources: CSREES NPLs, program managers & specialists Administrative Support LGU Faculty/ Researchers Extension practitioners Para-professionals Youth Volunteers Stakeholders Advisory Groups/ Councils Foundations</p> <p>In-kind Resources Space, food, time, transportation, etc.</p>	<p>Research & Evaluation Evaluation Studies Scholarly Activity LGU & External Funded Research</p> <p>Content & Educational Learning Opportunities: (ELO) 4-H Youth Development Programs with emphases on content areas of the Mission Mandates -SET, Healthy Living, and Civic Engagement</p> <p>Knowledge of 4-H Positive Youth Development</p> <p>Career Development Workforce Preparation</p> <p>Professional & Volunteer Development:</p> <p>Development of Paid and Volunteer Workforce Community and</p> <p>Organizational Management Program Development Processes</p> <p>Organization Policy and Practices</p>	<p>Relevant Fundamental or applied knowledge in positive youth development</p> <p>Print, on-line technology based information in positive youth development</p> <p>Practical knowledge for policy and decision-makers</p> <p>Information, skills & technology for individuals, communities and programs</p> <p>Participants reached</p> <p>Multiple training and program delivery methods implemented in positive youth development</p> <p>Consistent and equitable program management and policy practices</p> <p>Degree/certificate programs, internships, service learning related to Youth Development Degree Programs (4-H PRKC) Internships/Field Study</p> <p>Community collaborations & strategic partnerships formed with positive youth development practices</p>	<p>Participants understand concepts related to:</p> <p>Human Capital Increased knowledge and awareness of essential life skills, self responsibility, connectedness, and role as citizen scientists</p> <p>Social Capital Increased knowledge and awareness among practices fostering belonging within positive youth development.</p> <p>Civic/Political Capital Increased knowledge & awareness of problems and solutions supporting positive youth development through civic engagement</p> <p>Financial Capital Increased knowledge and awareness of resource development</p> <p>Natural Capital Increased knowledge and awareness of environmental issues and concerns</p> <p>Cultural Capital Increased knowledge and awareness of Inclusivity of cultures</p> <p>Built Capital Increased knowledge and awareness of opportunities to develop structures and infrastructures</p>	<p>Participants apply knowledge to improve their:</p> <p>Human Capital Incorporated and practice life skills, or changed behaviors</p> <p>Social Capital Increased application of applied practices fostering positive youth development</p> <p>Civic/Political Capital Integrated policies and practices in support of positive youth development</p> <p>Financial Capital Incorporated financial literacy and entrepreneurial skills</p> <p>Natural Capital Increased application and practices related to environmental stewardship</p> <p>Cultural Capital Incorporated and practiced cultural competency skills</p> <p>Built Capital Incorporated skills and practices to enhance community structures and infrastructures</p>	<p>Communities will enjoy the benefits of healthy ecosystems, vital economies, and social well-being through investments & improvements in:</p> <p>Human Capital Youth exemplify knowledge, skills, behaviors for fulfilling lives. Improved social, environmental and economic conditions in communities.</p> <p>Social Capital Sustained safe and supportive environments where youth thrive</p> <p>Civic/Political Capital Engaged youth and adults in the improved quality of life in communities</p> <p>Financial Capital Community financial resources are enhanced and expanded by engaged youth and adults</p> <p>Natural Capital Community natural attributes are preserved and/or improved by engaged youth and adults</p> <p>Cultural Capital Appreciation and celebration of all cultures within all aspects of a community</p> <p>Built Capital Engaged youth and adults ensure relevant structures and infrastructures within communities</p>

Assumptions - 4-H Youth Development program components include: content and educational learning opportunities, professional & volunteer development, research and evaluation, and organizational management. 4-H Youth Development is based upon these core elements:

- Support and Advance Mission Mandates through foundational, critical and emerging issues
- Content & ELOs are framed around the Essential Elements, Inclusivity and Life skills
- Learning experiences are developmentally age-appropriate
- Content is sequential; has a scope and sequence; has objective and standards & is research-based
- High-quality with a comprehensive developmental process
- Youth and adults are both learners: Individual and group learning is valued

External Factors - Decreased funding, changing priorities; coordination with other local, state and federal government agencies and institutions; societal attitudes; safety and economic conditions

4-H Science, Engineering and Technology Prepares Youth for the 21st Century Workforce

Facing a Critical Challenge

Although the United States is currently the world's economic and military leader, we are at a critical juncture. In today's global economy, it is more important than ever to develop a workforce strong in science, engineering and technology. We must adapt to meet the evolving economic and national security landscape of the 21st century. At the core of this challenge is our nation's proficiency in science, engineering and technology.

Too many young Americans do not have the science, engineering and technology career skills necessary to succeed—and meet our country's needs—in the future:

- Only 18 percent of high school seniors are considered proficient in science (NAEP, 2000)
- A mere 5 percent of college undergraduates earn degrees in science and engineering (Rising Above the Gathering Storm, 2006)
- Only 32 percent of current U.S. college graduates are earning degrees in these fields, compared to 66 percent in Japan and 59 percent in China.

In the next decade, our nation will face a significant workforce shortage in the critical science, engineering and technology fields that will put our leadership at risk—unless action is taken. The 4-H Youth Development Program offers a solution to address the need for future scientists.

Working Toward a Solution

With 4-H and the Cooperative Extension System's (CES) direct connection to the cutting-edge research and resources of the nation's land-grant universities and colleges, 4-H is strategically positioned to strengthen the U.S. global competitiveness and leadership in science, engineering and technology.

4-H's Science, Engineering and Technology (SET) initiative reaches about 6 million youth annually with hands-on learning experiences that foster exploration, discovery and passion for the sciences while encouraging young minds and filling the pipeline of young leaders proficient in science. Today, 4-H out-of-school opportunities focus on areas such as agricultural science, electricity, mechanics, natural sciences, rocketry, robotics, biofuels, renewable energy and computer science.

4-H Youth Enrolled in SET Programs

(Family and Consumer Sciences, Environmental Education, Earth Sciences, Plant and Animal Sciences, Science and Technology, Biological Sciences, Engineering and Physical Sciences)

Year	2003	2004	2005	2006	2007
Number of youth *	6.4	No data available	5.9	No data available	5

**Number of youth enrolled in millions. Numbers rounded. Data from the National 4-H ES-237 Reporting System.*

National 4-H Headquarters, along with its private partner National 4-H Council, has set the goal of preparing one million new young people to excel in science, engineering and technology by 2013. As a public-private partnership, 4-H can focus resources and expertise through SET to:

- improve science literacy;
- increase the number of American students seeking undergraduate degrees in science, technology and engineering; and
- increase the number of young adults pursuing careers in these fields.

More information is available at www.national4-hheadquarters.gov. Information on the SET initiative can be found at www.4-h.org/4Hset.html.

Through federal funding and leadership for research, education and extension programs, CSREES focuses on investing in science and solving critical issues impacting people's daily lives and the nation's future. For more information, visit www.csrees.usda.gov.

4-H Healthy Living

America's children and youth—particularly those living in rural areas--are facing several health challenges that can impact their quality of life. As compared to their urban and metropolitan peers, rural youth are found to have higher frequencies of binge drinking (4.1% compared to 1.6%) (SAMHSA, Office of Applied Studies, 2006), had higher incidences of obesity (16.5% versus 14.4%) (Jihong Liu, 2007), were more sexually active (62% compared to 51%) (Snyder, 2009), and were more likely to have made no health care visits (14.6% compared to 12.3%). Rural African Americans had the highest percentage of no health care visits at 21.2%, followed by Hispanics, then Whites (Probst, Moore, Willert Roof, Baxley, & Samuels, 2002).

The percentage of children with a parent-reported mental health problem is very similar in rural and in urban areas (7.5%). However, after controlling for insurance status and other variables known to affect access to mental health services, rural children are 20 percent less likely to have a mental health visit than urban children. (Lambert, Ziller, & Lenardson, 2009)

The Healthy Living programs in 4-H aim to provide access and opportunities for youth to achieve optimal physical, social, and emotional well-being.

4-H Youth Enrolled in Healthy Living Programs

(Food and Nutrition, Health, and Personal Safety)

Year	2003	2004	2005	2006	2007
Number of youth *	2.4	No data available	2.5	2.5	2.5

**Number of youth enrolled in millions. Numbers rounded. Data from the National 4-H ES-237 Reporting System.*

Citizenship

The Citizenship programs in 4-H provide opportunities for young people to develop and increase leadership skills such as decision making, goal setting, communication, conflict management and resolution, and problem solving. In turn, the young people, in partnership with adults, use these skills to identify community needs and develop and implement a plan to address those needs. Through this process, young people develop a sense of belonging and connectedness to their communities. According to Perkins, one study found that young people would stay in, or return to, their communities if they felt a connectedness and belonging to the community. This was more important in keeping the young, bright citizens in the community than economic job opportunities (Perkins, 2000).

Youth play a huge role in serving their communities. In 2009, about 15.5 million 12-18 year olds volunteered a total of 1.3 billion hours (Fritz). Although youth volunteering has been declining since 9/11, youth today are volunteering more than their parent’s generation (Youth Volunteering on Decline since Sept. 11, 2009). About 55% of young people volunteer compared to about 30% of adults. Although many schools are implementing community service requirements for graduation, only about 5% of students reported volunteering solely to fulfill this requirement. In fact, the majority of youth who volunteer do so out of altruism (Fritz). In addition to improving the community, youth volunteering has a positive impact on their development to become productive members of society. Teens reported that being active in community service teaches them to respect others, understand good citizenship, develop leadership skills and become more patient. Also, youth that volunteer at least once a week are about 50% less likely to abuse drugs, alcohols and cigarettes and engage in risky behavior (211 Info Bank Volunteering Services). Clearly, there are benefits of youth volunteering for the community, as well as for the youth themselves. In term of future success, a study indicated that 73% of employees would recruit a candidate with volunteer experience over one without (Benefits of Volunteering, 2005).

4-H Youth Enrolled in Citizenship Programs

(Civic Engagement, Community/Volunteer Service, Leadership and Personal Development, Communications and Expressive Arts)

Year	2003	2004	2005	2006	2007
Number of youth *	2	No data available	2.8	3.1	2.9

**Number of youth enrolled in millions. Numbers rounded. Data from the National 4-H ES-237 Reporting System.*

Reaching a Variety of Audiences with Targeted Funding

In addition to the funding and programs that support the overall 4-H program, there are separate agency and non-agency resources that focus on specific audiences. The 4-H National Headquarters administers the 4-H Military Partnerships, Children, Youth and Families at Risk (CYFAR), and Grants to Youth Serving Institutions (Rural Youth Development Grants). See Appendix B for more detailed budget tables.

Military Partnerships: The 4-H military Partnerships began with an Interagency agreement between CSREES and the US Army in 1995. The broad goal of the program is to promote positive youth development for military children and youth wherever they are located (military installations both in the US and overseas as well as those geographically dispersed youth whose parents serve in the National Guard and Reserves). These partnerships have evolved into formal interagency agreements between the Army, Navy and Air force and beginning in 2010, will also include the Marine Corps. There are three primary efforts under the Military Partnership umbrella:

- Establishing and maintaining 4-H Clubs on military bases world-wide
- Developing curriculum
- Supporting children and youth when parents are deployed

www.4-hmilitarypartnerships.org

Outputs:

- Establishing 4-H Clubs. Grants have been awarded to all 50 states, Guam, Puerto Rico and the District of Columbia to establish 4-H Club programs on all installations worldwide. More than 12,000 military youth are active members of 4-H Clubs each year and more than 50,000 youth have some type of 4-H experience. In addition, in 2008, there are 16 Extension Specialists from nine Land Grant Institutions on assignment to support these programs world-wide.
- Developing Curriculum. Three major curriculums have been developed through these partnerships and are used extensively throughout the 4-H program. They include:
 - “4-H 101”-- that includes the basics of developing and maintaining a 4-H Club;
 - “Preparing the Youth Development Professional”--includes information on youth development; and
 - “Up for The Challenge: Lifetime Fitness, Healthy Decisions”--provides activities and programming in the area of fitness and nutrition.

Army, Navy, Air force and CSREES have all funded trainings for more than 1,200 Military and Extension staff in the 4-H 101 curriculum.

- Operation: Military Kids (OMK). OMK, located in 51 states, builds community support networks for children and youth whose parents and loved ones have been affected by deployment. In 2008, OMK served more than 100,000 young people

and families that had a loved one deployed overseas. Since 2004, more than 250,000 young people have benefited from OMK programs and activities.

www.operationmilitarykids.org

Children Youth and Families at Risk (CYFAR): This program officially began with the first Congressional appropriations in 1990. A significant proportion of American children are at substantial risk for negative outcomes: infant mortality, undernourishment, abuse, neglect, poor health, substance abuse, teenage pregnancy, crime, violence, and academic underachievement, due to family, community, social, political, and economic conditions which they have not created. Poverty exacerbates most other risk factors, and it is the central reason that many children and families do not thrive. The focus of the CYFAR program is children and youth who face the risk of not acquiring the basic skills they need to become responsible family members, participants in the work force or contributing citizens.

Outputs: In 2007 CYFAR projects in 4- states and territories supported community programs at 121 sites reaching about 20,200 youth and 6,400 adults—a total of 26,600 participants. Of the participants, approximately 1,300 (5%) are pre-K; 11,100 (42%) are in grades K-6; and 7,900 (29%) are in grades 7-12. Fifty-three percent (53%) of all participants are from rural areas and small towns, 36% from towns and cities, 11% from central cities and less than 1% from suburbs. Of the youth, 78% live in poverty with percentages reaching up to 100% for some race/ethnic groups.

Almost 2,300 youth and adult volunteers provided more than 111,000 hours to the programs. This is valued at approximately \$2,165,610.00 based on the 2007 rate of \$19.51 established by the Independent Sector.

<http://www.csrees.usda.gov/nea/family/cyfar/philosophy.html>

Grants to Youth Serving Institutions (Rural Youth Development—RYD)

The Rural Youth Development Grant program, authorized by Congress in 2002, provides funding to the National 4-H Council, Girl Scouts of the USA, and the National FFA Organization to support programs which address needs of rural youth; and involve those youth in their own educational activities. These organizations focus on developing communities that support the positive development of young people and engage them in identifying community issues and finding solutions. Through partnerships with adults, diverse youth serve in significant leadership roles to improve their own lives and the communities in which they live.

These organizations, which reach one out of every three of the 13 million youth between the ages of 5-19 living in rural America, are using their collective 275 years of experience to provide experiences for youth to develop the leadership and entrepreneurship skills needed to become the next generation of a vibrant, sustainable rural America.

Outputs: In 2006, through 4-H alone, 64 communities located in 15 states were positively impacted. In these 64 communities 118 community issues were identified and

action plans were implemented to improve one or more of the community capitals (human, social, civic/political, financial, natural, built, cultural).

Each state received \$25,000 to implement this program for a total investment of \$375,000. Approximately 5,500 youth and adults contributed about 182,000 hours to improve their communities at an estimated value of over \$3.2 million. Almost 400 agencies and organizations formed community-based collaborations that leveraged about \$154,000 in cash and in-kind resources. For every federal dollar spent in 2006 there was a \$9.00 return on the investment.

http://www.csrees.usda.gov/nea/family/in_focus/youthdev_if_grants.html

4-H Youth Development Programs Build the Seven Community Capitals

Through 4-H, communities are improved in all seven capital areas (human, social, natural, civic/political, cultural, natural, economic, and built. For example:

Human capital is increased as young people learn and apply information and skills in a variety of content and life skill areas. As young people develop confidence, competence, and character as well as a sense of connection to their communities, and a sense of caring and compassion for others, communities are positive places for people to grow and develop. Human capital in communities grows stronger as young people increase SET (21st Century) skills and learn how to live healthy lives. Gaining and applying technology skills are also integral to the 4-H program and prepares young people for the future.

Social capital is increased through 4-H as young people are connected with caring adults outside their family members and with agencies and organizations within their communities. These youth-adult partnerships often last over many years. These relationships connect individuals and social networks that foster reciprocity and trust.

Civic/Political capital is increased as young people learn and apply leadership skills such as decision-making, communication, conflict resolution, goal setting, problem solving and group facilitation. These skills are applied in a variety of settings such as their youth organizations, schools, communities, and counties.

Cultural Capital is increased as youth from various cultures learn to work together, learn about different cultures, and celebrate important cultural observances and customs. This is particularly true in areas (that have been predominantly populated by Caucasians) that have seen a significant immigration of people from different racial/ethnic backgrounds.

Financial Capital is increased in communities as youth and adults bring cash resources to communities through grants to work on projects, donate in-kind resources, and work with agencies and organizations to leverage additional resources to address community needs. In addition, as youth learn concepts related to finances and wealth, long-term financial capital is increased for families and communities.

2009 Community Sustainability and Quality of Life Portfolio Annual Report

Natural Capital is increased as many youth select environmentally focused civic engagement and service learning projects that improve land, water, and/or air quality in their communities.

Built Capital can be influenced by young people as they increase their civic and political capital, receive funding to work on projects, and apply their leadership skills in the community to build structures and infrastructures that will enhance the quality of life in their communities.

Cash and Human Resources

Agency Funding: Through agency funding mechanisms, 4-H Youth Development Extension Programs are supported by:

- Smith-Lever Formula 3(b) & (c) Funds
- Smith-Lever Formula 3 (d) Funds (Children Youth and Families at Risk)
- Hatch funding for research programs
- Line item funding (Rural Youth Development)

Non Agency Funding: 4-H programs are also critically dependent upon private funding and accessing non-agency federal dollars. The Department of Defense and individual branches of the military provide significant funding annually. National 4-H Council is responsible for raising private money to support the 4-H program in ways that cannot be supported by federal dollars. State 4-H foundations also provide funding for educational programs and activities at varying amounts.

The following table is a summary of agency and non-agency funding for 4-H. More detailed funding tables can be found in Appendix B.

Funding for KA 806: Youth Development						
Agency and Non-Agency Funding						
\$ in the thousands						
	FY 2003	FY 2004	FY 2005	FY 2006	FY 2007	Total
Agency Funding	11,287	10,098	10,018	9,919	61,181	102,503
Non-Agency Funding	19,873	21,737	19,049	23,142	56,716	140,517
Total	31,160	31,835	29,067	33,061	117,898	243,021

Percentage of Agency Funding Going to Support 4-H. From information generated by the CSREES Leadership Management Dashboard (LMD), the 4-H program has the largest allocation of formula funds (\$48,547,934.87 or 9.87%) of any KA in the agency. The next closest is “Plant Management Systems” at 6.07%, followed by “Human Development and Family Well-Being” at 3.89%. The other KA’s are funded at 3.37% and below.

4-H Staffing. Most formula funds are used to support teaching, research and Extension staff salaries. When translated to Full-Time Equivalent (FTE’s), 4-H has the highest number of staff (2,370.8) working in the program than any other KA. The next highest

number is KA 205, Plant Management Systems at 1,125 FTE's. This is about 50% less than allocated to the 4-H program. All other KA's have significantly lower FTE's.

In addition to the FTE's funded by state universities, CSREES contributes approximately 11 FTE's of staffing at the 4-H National Headquarters.

Teaching - Results

The Great Plains Interactive Distance Education Alliance (Great Plains IDEA, or GPI) is a consortium of human science colleges at ten universities that offers a multi-institutional post-baccalaureate degree program in youth development (**Online degree program**). The youth development program offers a thirty-six-credit master's degree as well as two certificates for individuals who do not wish to pursue a master's degree: specialist certificates in youth development or youth program management and evaluation. Twenty-eight credits for this program are offered through the consortium, with the remaining eight credits offered through the student's "residential institution." These last eight credits permit faculty and degree candidates to take courses furthering their specialization or negotiate practicum experiences, where they can work with their faculty adviser to enhance and apply the skills they have acquired. Great Plains IDEA is the only alliance of public universities to offer a graduate program or graduate certificate completely online in youth development.

Clemson University offers a 36 credit hour Master of Science in Youth Development program. This degree is designed to fulfill the need across the state, region, and nation for formal education that prepares students for careers in youth related areas. The interdisciplinary program is a college-wide degree program involving units in the College of Health, Education, and Human Development (HEHD) as well as related disciplines across the campus. The program is provided entirely through *distance delivery*. However, an on-site 3-day session is required each fall and spring.

University of Minnesota in the College of Education and Human Development, in association with the Center for 4-H Youth Development, offers Youth Development Leadership Master of Education degree. An interdisciplinary faculty teaches this 30-credit master's degree program. Students are fulltime, working professionals with at least two years of work experience in the field. Each yearly cohort averages 21 people. Focus areas include concentrations in evaluation, research, children's rights, counseling, program development, special needs populations, supervision, family systems, and social group work. There will soon be options at University of Minnesota to move from an undergraduate Youth Studies degree, to an MA to MEd, and then a PhD, with non-credit options in between from the Youth Work Institute.

Research - Results

Penn State 4-H Alumni Study

Human and Civic Capital

Radhakrishna (2004) researched alumni of 4-H programs in Pennsylvania. He found that skills learned in 4-H continue to influence 4-H participants in later life and career experiences. Pennsylvania 4-H alumni who were members of other youth organizations view 4-H as most helpful in teaching subject matter skills, communication skills, teaching responsibility, and participation in community activities.

Outcomes: Enrollment in 4-H and completing 4-H projects contributed to leadership development, decision making skills, communication skills, and willingness to take responsibility.

4-H Positive Youth Development Study

Private Funding; National 4-H Council

Human, Social, and Civic Capital

The 4-H Study of Positive Youth Development (Lerner et al., 2008) is a longitudinal study that began with 1719 fifth grade youth during the 2002-2003 school year and 1137 of their parents.

Outcomes:

- 4-H youth were more than one and a half times more likely to expect to go on to college than non-4-H youth.
- 4-H youth had higher school grades and were more emotionally engaged in school than non-4-H youth.
- Those who participated in 4-H scored significantly higher than those youth who did not participate in 4-H on six of eight factors related to Civic Identity and Civic Engagement.

National 4-H Impact Assessment Project

Private Funding, National 4-H Council; State Self-Assessments

Social Capital

This was a 2001 national study of youth in grades 4 through 12 who participated in 4-H clubs, school enrichment, special interest programs, and after-school programs; 2,467 young people and 471 adults completed a survey that examined the critical elements of 4-H youth programming and outcomes.

Outcomes:

- Youth who participate in 4-H have a strong sense of belonging, feel emotionally and physically safe in these settings, and develop positive relationships with supportive, caring adults.
- Youth who report being in 4-H for longer periods of time have higher scores on measures of learning in 4-H, as well as higher scores on a measure of “helping others.”

Montana 4-H Impact Study

Human, Social and Civic Capital

In 2000, the Montana Extension Service conducted a survey of youth in 4-H in grades 5, 7, and 9 (and youth not in 4-H) in 21 randomly selected counties in the state. Youth were considered to be 4-H members if they had been participating in 4-H for at least a year; 4-H members were compared to non-4-H youth on a variety of dimensions. Data from 2,500 youth were analyzed.

Outcomes:

- 4-H participants are more likely than other youth to participate in other out-of-school time activities or programs; be involved in leadership roles; help others in the community; and excel in school.
- 4-H youth are less likely than youth who are not in 4-H to engage in problem behaviors such as shoplifting or stealing and using cigarettes or illicit drugs.
- 4-Hers are also more likely than non-4-Hers to go to a non-parental adult for help with important questions in their lives and are also more likely than non-4-H youth to talk to their parents about concerns about drugs, alcohol, sex or other serious issues.

Multi-State 4-H Impact Study

Human, Social and Civic Capital

Several other states, including New Mexico, Colorado, Idaho, and Utah have replicated the Montana Extension Service study and have found similar results. For instance, Idaho replicated the Montana 4-H study and collected 3,601 surveys from 5th, 7th, and 9th graders in 53 randomly selected schools during the fall of 2002 and spring, 2003 (Goodwin, Barnett, Pike, Peutz, Lanting, & Ward, 2005).

Outcomes:

- Youth who participate in 4-H are less likely than their non-4-H counterparts to report engaging in problem behaviors such as shoplifting, drug use, vandalism, and smoking.
- 4-H youth are more likely than non-4-H youth to report being successful in school, helping others in their communities, and taking on leadership roles.
- 4-H youth also report better relationships with adults than youth who were not active in 4-H.

CareerSmarts

(CRIS #0183467)

Human, Financial, and Social Capital

North Carolina State University Cooperative Extension Service developed the *Parents, Youth and Careers* program which assist parents with helping their children choose careers. The university also conducted an evaluation of the 4th edition of *CareerSmarts*,

a research-based career development program designed for use with early adolescents in voluntary youth organizations. The study evaluated both the leader training and adolescent program phases. Twenty-nine adult program presenters and 382 students, including a control group, from five counties were evaluated in four critical areas using pre- and post-test questionnaires.

Output: This program provided training for more than 5,000 counselors and youth workers nationwide.

Outcome: The program successfully instilled such basic job seeking skills as the ability to interview successfully, writing an appropriate resume, and completing a job application form.

Extension Results

Seeds to Success Youth Farmstand Project

Human and Natural Capital

This Rutgers Cooperative Research and Extension program is an entrepreneurial and life skills training program that prepares at-risk special needs 14-18 year olds for the workforce. Youth are taught how to select and prepare locally grown fruits and vegetables for use in meal preparation and how to handle money and simple banking procedures. They practice workforce readiness and business skills, as they sell produce and manage a youth-run farm stand during a nine-week summer work experience.

Output: In 2004, 25 of 28 students completed the program (an 89 percent retention rate).

Outcomes: At the end of training and at the end of the selling season, youth were tested on skills in five areas: 1) making change and processing government vouchers; 2) identifying produce; 3) using a cash register; 4) using a produce scale (and knowing equivalent weights); and 5) knowledge of produce-related measurement terms.

Participants demonstrated a statistically significant improvement (alpha .05 or less) in three of the five areas: 1) making change; 2) identifying produce; and 3) using a produce scale. Total scores resulted in a statistically significant increase in skills (alpha = .014).

YES

Smith Lever 3(d); CYFAR

Human Capital

In De Soto Parish, Louisiana, 46 children in grades K- 6th participated in the YES program. Thirty-six children in the 4th grade involved in standardized testing receive intense tutorial programming in math and language arts by Southern University CYFAR staff. The children participating in this tutorial after-school program were identified by school administrators. These 36 students have repeated a grade more than one time.

Outcomes:

- Of the ten participants in the program who had either failed or scored in the lowest passing percentile in the Louisiana Educational Achievement Program (LEAP) standardized test in 4th grade, all passed and did not have to repeat the fourth grade.
- All the students surveyed believed they learned math skills, 70% stated that the program helped them with the LEAP test this spring and summer, and 85% reported being better able to solve reading problems, multiply, divide and subtract.

Speak Out for Military Kids (SOMK)

Non-Agency Funding, 4-H Military Partnership program.

Human and Social Capital

More than 1,300 military and non-military youth have participated in SOMK, a youth led speakers bureau made up of military and non-military youth in a particular state. They are tasked with developing creative means of educating the public to the issues surrounding military children and deployment. In Kansas, SOMK has developed an Interactive Theater presentation that goes through the life of a young person whose parent is deployed ; SOMK Youth in New Jersey have developed a DVD titled “Young Heroes” which educates civilian audiences to the “deployment cycle” and issues that arise; and in Iowa, SOMK Youth developed a board game called “Deployment: It’s not a Game”, which puts players in the shoes of a child experiencing the deployment of a loved one.

Addressing Hunger in Kentucky

Extension Activities, Rural Youth Development Program

Human and Social Capital

The neighboring communities of Tompkinsville (pop. 2,600) and Gamaliel (pop. 439), Kentucky, have experienced steep economic declines. Over the past six years, 800 local jobs have been lost. Median incomes are between \$18,000 and \$24,000. One by-product of these economic conditions is a growing number of youth suffering from hunger. Statistics show 75% of children in grades K-5 are eligible for free and reduced meals.

Outputs: Ten 4-H youth and adults from the community, who were trained in facilitation skills, convened a town forum that engaged an additional 75 youth and adults. Through the town forum discussions, hunger was identified as the leading community issue. It was particularly an issue on weekends when schools were closed and there was no free lunch or breakfast available to the children. To address this need, 20 4-H youth and adults formed a partnership with the family resource center to prepare and distribute backpacks of non-perishable, nutritious food every Friday for 40 children in economically deprived families.

Outcomes: This 4-H youth-led effort has leveraged over \$130,000 in cash and in-kind support, decreased hunger, improved nutrition, and increased human, social, and civic capital in these two communities.

OMK Hero Packs

Non-Agency Funding, 4-H Military Partnerships

Human and Social Capital

As part of the Military Partnership efforts, Hero Packs are assembled and distributed to children whose parents or family members are deployed. They contain a variety of items to assist children with the deployment and to stay in contact with their loved ones. Each Hero Pack is assembled by local community organizations such as 4-H, The American Legion, Schools and others.

The Hero Packs contain items such as:

- stamps, stationary, journals, disposable cameras
- books and games for the children
- movie passes, gift certificates for common household chores (changing the oil, mowing the lawn) or free dinners donated by the community
- a personal letter of thanks from local children to the military child
- parent information on available programs and resources.

The Packs are delivered to each child by another child at an official ceremony. The Hero pack project is an example of community service by a number of partners and organizations.

Output: To date, more than 100,000 Hero Packs have been delivered to children of deployed families.

Outcome: This program builds the social structures and networks to support the families of deployed servicemen and women.

Eagle's Nest/Owl's Roost Environmental Discovery (ENOR) Program

Smith Lever 3(b) & (c)

Natural Capital

This Colorado Cooperative Extension Program, gives 4th and 5th grade students the opportunity to experience Colorado's natural and cultural history through hands-on, out-of-doors experiences. Colorado's Front Range communities have experienced exponential growth and development over the past few decades. Much of this growth is due to migration from other parts of the country and immigration from other countries. ENOR educates future homeowners, small acreage managers, and decision-makers about sustainable ecological techniques and wise-use practices.

Outcomes: End-of-program survey results from 48 percent of parents and 86 percent of students were analyzed. Findings include that 100 percent of 5th grade and 98 percent of the 4th grade students identified at least one action they would take to help the environment. Participants also identified one practice (skills such as compass reading, safely observing wildlife, and environmental education games and activities) they would teach or share with their families.

4-H Forestry Education Program

Smith Lever 3(b) & (c)

Natural Capital

This program, conducted by Washington State Extension staff, is a natural resource education program offered to students. The student groups have substantial representation of minority groups, low-income families and gender parity. The program engages local youth in “Outdoor Classrooms” where they learn about the environment and natural resources surrounding their communities. Students develop an understanding of the relationship between healthy forests and healthy communities. With resource partners from over 30 local, state and federal agencies, student participants conduct water quality surveys, and monitor staff gauges and stream velocities in support of local watershed planning efforts, collecting field data for various fish and wildlife studies and helping to build and maintain trails, campsites, and wilderness areas for public use.

Outcomes:

- Participants complete a “Life Skills Evaluation” with documented results indicating over 90% of participants reported significant gains in pre-post program measured objectives. The students’ gain increased recognition and understanding of the issues facing local government, natural resource managers and the local economy, while serving their communities and gaining valuable insights into both employment and educational opportunities.
- Local schools are reporting significant *improvements in student behaviors* and a renewed interest in classroom activities as a result of participation in the program.
- Program participants have been recruited and trained by local U.S. Forest Service Districts, one student was placed with the National Parks Department and several students chose to enroll in regional colleges and universities to pursue degrees in the natural resource field as a result of their involvement in program activities.
- Agencies receive additional help in monitoring the environment and the community benefits from increased stewardship and service.
- Added financial and social benefits are predicted in increased social and financial benefits from increased human capital, social capital, and environmental capital, while expenses and impacts related to juvenile crimes, truancy and other associated negative behaviors are reduced.
- The program received the prestigious “Caring for the Land” award from the U.S. Forest Service for “Outstanding Environmental Education Program” and garnered national attention from the National Association of County Officials for involving youth in community service and local government.

Corroboree, 4-H Across the Seas Science Education Website, Oregon State University Extension and the Oregon 4-H Center.

Smith Lever 3(b) & (c)

Cultural Capital

A professional development travel exchange between Oregon 4-H Agents and Australian school teachers led to the development of this program. Participants in this web-based

science education program are youth engaged in 4-H science clubs using outdoor classrooms with five schools in Oregon and Australia.

Outputs: Students liked the pictures and graphics on the web site; the organization of the web site lessons; and the ease of use of the on-line data collection pages.

Outcomes: Evaluation results show statistically significant changes in using the web to learn science ($p = .072$; $N=69$) and liking to learn about people from other countries ($p = .043$; $N=66$).

New Directions

University Outreach & Workforce Development Project: The Extension System-Military Partnership

Military Funds will provide approximately \$25M in new money annually.

The Cooperative State Research Education & Extension Service, National 4-H Headquarters is currently formalizing a partnership with the Department of Defense, Office of the Under Secretary, Military Community & Family Policy. This partnership, when finalized, will provide funding from the Military to CSREES to engage Land-Grant Universities, through the Cooperative Extension System, in the several programs and activities.

Land-Grant University faculty and staff will provide leadership to the development and implementation of programs for military youth, families and communities and civilians in local communities across the country. They will include:

- internship programs
- a year of service for college students
- professional development for child care teacher trainers
- communications & outreach of available youth opportunities, and
- community-based Extension programs (i.e., basic meal planning, custodial caregiving, youth/family gardening, and teen leadership)

Through this partnership, opportunities will exist for:

- former 4-H members and other college student to participate in internships and service opportunities;
- state Extension programs to gain access to up-to-date and relevant curriculum materials;
- faculty/staff to be engaged in research, presentations, program development, and program delivery in communities.

Note: Pending final MOU.

Science, Engineering and Technology

There will be continued priority placed on Science, Engineering and Technology. As noted above, 4-H youth development brings the application of technology to rural as well as urban youth through programs such as water quality testing, interpreting ultrasound images, use of GPS and GIS in production agriculture and the management of natural resources, ethical use of bio-engineering and even the effects of zero gravity on crop production in space. Youth learn and demonstrate the practical application of the Land-Grant Universities' knowledge and research base for the benefit of their communities, including eXtension. Through the ongoing 4-H National curriculum development process, new curricula will be developed.

Healthy Living

There will be a continued emphasis on Healthy Living Programs. Some of the deliverables include a white paper that will guide the nation-wide work, a logic model, resource guide, curriculum, and funding. In May 2009, National 4-H Council awarded 15 states grants in the amount of \$50,000 each to conduct healthy living programs.

National Program Leaders are represented on a Federal Task Force to develop adolescent health objectives for "Healthy People 2020." The 4-H efforts involve several NPL's from CSREES in order to integrate programs such as the Expanded Food and Nutrition Education Program (EFNEP) and other national efforts in physical fitness, nutrition, and other dimensions of health and well-being.

Section III: Secondary Knowledge Areas

Knowledge Areas 703: Nutrition Education and Behavior and 704: Nutrition and Hunger in the Population:

Work conducted under the Nutrition and Healthier Food Choices Portfolio has a strongly integrated balance of nutrition education research and extension/outreach programs. Nutrition education research encompasses two broad themes –first, understanding the behavioral factors that influence choices related to food and physical activity; and second developing and evaluating intervention programs that help people and communities move from where they are to where they should be in terms of overall health and economic well being. Nutrition education and environmental intervention programs help increase knowledge and change behavior. These areas of nutrition are represented by Knowledge Area 703 “Nutrition education and behavior” and Knowledge Area 704 “Nutrition and hunger in the population.”

Key KA703/704 Outputs and Outcomes

Expanded Food and Nutrition Education Program *Smith Lever 3(d)*

Based on the short term outcomes, educational interventions are developed by practitioners. Effective interventions are identified using newly developed evaluation strategies. Based on the training they receive, program participants improve their diets and diet related behaviors. Because of the high quality education they receive, the numbers of qualified researchers and practitioners are increased. Based on findings from research and practice, community leaders and policy makers introduce changes that foster healthy diets and physical activity, and improve food security and the sustainability. An example of a key outcome related to knowledge gain is: As a result of participation in the Expanded Food and Nutrition Education Program (EFNEP):

- **88% of adults improved** their Nutrition Practices (NP),
- **83% of adults bettered** their Food Resource Management (FRM) practices, and
- **66% of adults improved** their Food Safety (FS) practices
- **71% of youth now** eat a variety of foods
- **63% of youth improved** practices in food preparation and food safety
- **61% of youth increased** ability to select low-cost nutritious foods

The health of Americans has improved, resulting from improvements in diet quality and physical activity. An example of a key outcome related to knowledge gain is: As a result of participation in EFNEP:

- **91.5%** of adults reported improved dietary intake, including an **increase** of about 1.4 servings per day of fruits and vegetables
- At entry, **19.7%** of adults reported consumption of at least 1/2 of the recommended servings for each food group at exit, after completing EFNEP, this percentage increased to **41.0%**.

Knowledge Area 902: Sustainable Agriculture Research and Education Program:

Program Introduction

The Sustainable Agriculture Research and Education program (SARE) works to develop and share knowledge to increase farm profitability, to promote environmental stewardship, and to enhance the quality of life for farm families and their communities. This work directly supports the maintenance and enhancement of community economic capital, natural capital, human capital and social capital. The SARE program is specifically authorized in statute to be delivered through four regional administrative councils (at least) with significant autonomy to determine the highest regional priorities and structure competitive grant programs that fit these needs. All four regions offer Research and Education (R&E) grants, Producer Grants, and Professional Development Program (PDP) grants. The Northeast, Southern and Western Regions offer Professional plus Producer Partnership Grants. Germane to this portfolio, the Northeast and Southern regions have begun offering Community Innovation grants that forge connections between sustainable agriculture (SARE) and community development. Together as a whole these grant programs address crop and livestock production and marketing, stewardship of soil and other natural resources, economics and quality of life.

Program Key Activities

SARE entered its 20th anniversary year and to date has funded over 3000 projects through its regionally-focused program delivery. Over 10,000 farms and ranches have been assisted by the SARE program in learning more about and adopting practices on their farms or ranches that balance environmental, economic and social concerns towards achieving a more fully sustainable operation. The regional R&E grant programs generally provide from \$60,000 to \$150,000 for projects that involve scientists, producers and others in an interdisciplinary approach. Professional development grants generally provide from \$20,000 to \$90,000 per state for programs that educate extension, NRCS, and other agricultural professionals about sustainable agriculture. Producer grants, typically between \$1,000 and \$15,000, go to farmers and ranchers who test innovative ideas and share the results with their neighbors. The Professional plus Producer Partnership Grants Projects provide a maximum of \$10,000 to \$50,000 depending on the region. The Community Innovation Grants provide up to \$10,000 to \$25,000 depending on the region.

Program Outcomes

Surveys of farmers, extension educators, and researchers help quantify that SARE is achieving results on the ground. A 2005 survey of farmers and ranchers who received western SARE grants reveals that grant recipient experiences were overwhelmingly positive:

- 64 percent said their SARE project helped them achieve higher sales
- 41 percent reported increased net income
- 79 percent experienced improved soil quality
- 69 percent saw increased wildlife habitat

Project Examples

- The Southern SARE program has teamed up with the Southern Rural Development Center to implement a community grants program that funds such

initiatives as nutrition classes centered on local foods and agritourism training for county officials and farmers. The program has invested over \$700,000, including a contribution of \$200,000 from the Appalachian Regional Commission, in 60 community projects.

- The Northeast SARE program funded a project in Hancock County, Maine to connect farms and schools, thereby growing markets for local farms and improving child nutrition. As of fall 2007 a total of five schools with 820 students will regularly purchase from eight area farms. In addition the University of Maine Extension service distributed a farm to school directory to every county Extension Service office in the state.
- The Western Regional Development Center and the Western SARE program have continued a long collaboration on agricultural entrepreneurship that contributed to the creation of the *Tilling the Soil of Opportunity: NxLevel Guide for Agricultural Entrepreneurs* training program which is considered one of the most important national training programs for agricultural producers. The course has been offered across 20 states at universities, small business development centers and other educational facilities. More than 50 percent of the participants complete the course with a business plan.
- The Southern SARE program provided a Sustainable Community Innovations grant to a grower's cooperative in economically depressed East Tennessee. This grant was used to implement a variety of recruiting activities that resulted in the growth of the cooperative from 65 members the year before to 87 members, a 34% increase in one year. Thirty of the members made 64 different food or farm products. Through the project, many of them received business and on-farm technical advice ranging from recipe and label development recipes to help placing their products in local markets. In addition, an advisory committee was formed that is now looking into the feasibility of a retail store for the members' value-added products.
- A North Central SARE Graduate Student grant of \$9,995 helped support research into the intergenerational transfer of farming operations and farmland at the rural-urban interface (RUI), where farmland is at risk of being developed for non-farm purposes. The research objectives were to assess how household goals and values, succession, life cycle effects, farm structure, and land use policy affect the continuation of a farming enterprise and ultimately the successful persistence of farming at the RUI. Research findings have been presented at three professional meetings, and at the USDA Agriculture Outlook 2009 meeting. Reports and fact sheets directed towards Extension, planners, and other appropriate governmental and nongovernmental organizations are being developed. These will help agencies concerned with agricultural economic development by providing insights into strategies that will create long term working agricultural landscapes.
- The Western SARE program provided a grant to the Southwest Marketing Network, a collaborative of tribal communities, farmers, ranchers and service

providers in the Four Corner states. This grant was used to develop “distance learning tools” to increase producer’s profitability. These tools taught nearly 500 producers and buyers about such topics as cold-frame building and innovative techniques to extend the growing season.

- The Northeast SARE project has provided \$37,514 for the Carrot Project which works to narrow financing gaps in the agricultural community and refine alternative financing opportunities that address the steady consolidation of lenders with mandates or expertise in agriculture. Particularly affected are farm startups and expansions, farms with unusual business models, and farms without much collateral. SARE funds have supported the delivery of technical assistance and flexible financing. The program is exploring whether conventional debt financing can be replaced with equity financing. In this model, an investor gives capital to a farmer in exchange for an agreed-upon share of future profits; much as consumers buy CSA shares thus sharing risk and reward from future harvests.
- A North Central SARE Professional Development Program (PDP) grant of \$75,000 over a two-years enabled the the CS Mott Group for Sustainable Food Systems at Michigan State University (Mott Group) to partner with thirteen Michigan communities to stimulate and support community approaches to lessening the distance between food production and food consumption. Although the profile of each community food team that participated differs, the majority of teams saw evidence of the shifts toward increased connection between consumers and their source of food. These include: an increase in access to fresh and local foods, an increase in the percentage of growers' household income through farm sales, an increase of customers at direct market, increased capacity of local farmers to meet increased demand and a distribution system that can accommodate these agricultural shifts.

Section IV: External Panel Recommendations and the Portfolio's Response

Relevance:

The panel operationally defined relevance as *the ability of the CSREES-F+S (the entire network that encompasses the partnerships with state programs funded in part or full through CSREES) to make good investments and to focus on real and critical issues.*

Scope:

The panel felt that the portfolio demonstrated exceptional coverage. The panel members believe this breadth was possible because of the hard work of the CSREES-F+S as they engaged with a variety of other entities to deliver programs. The panel was particularly impressed with the creative leveraging of funds and other resources by the Deputies and the NPLs. However, this breadth was also seen as a weakness: The panel was concerned that resources may be spread too thinly to accomplish significant, long-term outcomes in the highest priority areas. The evidence in the self-review document and in the presentations gave the panel an impression that programming was “scatter-gun” (i.e., too broad or dispersed). They were uncertain as to whether this was a reflection of an inadequacy in the data collection systems, or an accurate representation of the scope of the portfolio.

Funding was discussed explicitly as it affects possible scope. Given the realities of how funds are allocated and how reporting has historically been managed, the panel was very impressed with the quality and quantity of programming that CSREES-F (the Federal office in DC) presented in this portfolio. This level of productivity within a tightly constrained environment is remarkable.

Additionally, the panel applauds the efforts of NPLs and Deputies in partnering with other agencies in order to augment the resource base for meeting priority goals.

Recommendations:

The panel encourages the agency to continue developing these partnerships, but in a more focused way. The best asset of CSREES-F+S is its access to a network that can optimize communication among CSREES-F, the states, and local citizens. This is the unique and powerful asset other agencies need to fulfill their own missions. This broad-based communication network that sends information in all directions should be strategically leveraged to acquire new funding/partners, which, in turn, should form the foundation for a new agency strategic plan to guide this portfolio. As a final point, the panel believes it essential that CSREES-F have sufficient discretionary funds to react to rapidly-emerging problems of national priority, to leverage opportunities, and to attract partnerships. The extent to which the current budget supports this is not known by the panel.

Portfolio Response:

To react quickly and appropriately to quality of life issues of national importance, CSREES continues to seek partnerships and opportunities to leverage resources. Despite the lack of discretionary funds which continues to be challenging for programs in this portfolio, NPLs continuously work with existing partnerships and build new partnerships

to enhance agency effectiveness in meeting rapidly-emerging, mission relevant problems. Examples of these efforts over include:

- Financial Literacy:
 - As a result of high visibility with federal partners of www.extension.org/personal_finance, especially the Ask-An-Expert function, the Social Security Administration will feature this resource in the Social Security Statements that go to 135 million Americans. To avoid setting precedent with a dot org URL, USDA approved and created the redirect URL www.usda.gov/personalfinance.
 - CSREES is one of 20 federal agencies represented on the Financial Literacy and Education Commission, established under Title V, the Financial Literacy and Education Improvement Act which was part of the Fair and Accurate Credit Transactions (FACT) Act of 2003. The FACT Act named the Secretary of the Treasury as head of the Commission and mandated the Commission include 19 other federal agencies and bureaus. The Commission coordinates financial education efforts throughout the federal government, and supports the promotion of financial literacy by the private sector while also encouraging the synchronization of efforts between the public and private sectors. CSREES also is a federal partner in the Jump\$tart Coalition for Personal Financial Literacy, which focuses on K through post-secondary financial literacy; the American Savings Education Council, which focuses on financial security in retirement, and the National Savings Forum, designed to encourage wealth-building and debt reduction by American households.
 - Obtaining significant funding from the U.S. Department of Defense, the FINRA Investor Education Foundation, the National Endowment for Financial Education, the Consumer Federation of America Foundation, the Citi Foundation for research and education leading to improved financial security for Americans.
 - Signing a Memorandum of Understanding with the National Endowment for Financial Education (NEFE®) to revise, deliver and evaluate the NEFE High School Financial Planning Program.
- Healthy Homes and Rural Housing:
 - The Housing and Environment program is working with HUD and the Office of Lead Hazards Control and Healthy Housing as a funded grantee under their Healthy Homes program to provide outreach through land-grant partners. The group is working with USDA's Rural Housing Service to offer homebuyer education for first-time homebuyers, with the Department of Homeland Security, FEMA, and the Southern Regional Rural Development Center to obtain field assessments of disaster awareness and the state of emergency preparedness among disadvantaged households, and with research data from the University of North Carolina's Center for Urban and Regional Studies. Healthy Housing includes economics, energy and environmental issues of healthy housing.
 - Partnering with USDA's Rural Housing Service to offer pre-purchase homebuyer education throughout the United States through State Extension Services.

- Human Health:
 - Two NPLs are members of the Healthy People (HP) 2020 Adolescent Health Workgroup composed of individuals from both the federal and private sector. This workgroup selected and reviewed a set of 21 critical health objectives from HP 2010 to determine placement (drop, keep or modify) in HP 2020. In addition, both NPLs are members of a workgroup subcommittee charged to determine objectives related to the promotion of healthy development, healthy behaviors and to the creation of social and physical environments that promote good health for youth. This is noteworthy in that this is the first time HP reflects the integration of health determinants and disease/conditions; thereby, promoting the notion that health is not the responsibility of the health sector alone, but includes personal, social, economic and environmental factors. This approach aligns nicely with the social capitals organization of this portfolio and has the potential to support portfolio youth objectives in terms of health indicators, data needs and outcome measures.
 - A commentary titled “USDA CSREES’ Role in Broadening Support for a Healthy Nation” published in the Journal of Extension (46:1) emphasizes the health challenges faced by rural older Americans and discusses how CSREES’ is strategically directed and uniquely positioned to address many of these challenges through effective research, education, and Extension activities.
 - Coordinating health-related KAs in a project to enhance the scope of health services in communities by partnering CSREES with cancer awareness and prevention organizations and land-grant universities to promote cancer screening for women in rural and isolated areas.
 - Developing a new partnership with FDA’s Office of Women’s Health to expand research and outreach efforts, specifically targeted at health issues of women, their families, and caregivers.

- Youth:
 - Collaborating with 4-H State Program Leaders to provide leadership and consistent messaging in programming, evaluation, professional development, and research to the 4-H Mission Mandates: Science, Engineering & Technology, Citizenship, and Healthy Living.
 - Gathering stakeholder input for planning for after-school program directions through monthly calls with 4-H Afterschool University Contacts and the NAE4-HA After-school Task Force (that is soliciting more input from stakeholders for a pre-conference to NAE4-HA).

Focus:

The panel operationally defined ‘focus’ as “*the ability of the portfolio to remain focused on issues, topics, and critical needs of the nation*” using the language found in the Criteria and Dimensions section of the self-review document (Section IV, p. 258). Based on this definition, the panel felt linkages to issues that are of critical needs to the nation, and appropriate to the portfolio, are moderately focused.

Overall, the panel was not convinced the portfolio prioritized the highest, most critical needs of the nation to address *Quality of Life in Rural America*. The panel attributed this to a lack of a targeted strategic plan for the portfolio. Further, the review panel believes

the strategic plans developed by USDA and CSREES-F do not seem focused enough to truly guide the portfolio.

When panel members asked individual NPLs what their top funding priorities would be if given an infusion of dollars, some were unable to respond immediately. This hesitancy suggests that a *focused* strategic planning exercise is overdue within the agency. The panel stresses that such a strategic plan can only be developed through consultation with stakeholders. It is only through true collaborations with stakeholders that a focused plan can be jointly created.

Recommendations:

Because budget can be a good proxy for inferring an agency's priorities, CSREES should articulate the relationship between funding levels and priorities for possible realignment. The panel recognizes that there are constraints but encourages CSREES-F to provide greater leadership in focusing resources on programs that will be identified as top priorities in the strategic planning process. The panel recognizes that the focusing of programs is tantamount to reducing or eliminating certain programs. This is unfortunate, but may be necessary for significant national impact. CSREES-F+S should be involved in ongoing cost-benefit analyses which may help in the determination of priorities.

Portfolio Response:

- Following the portfolio review and panel assessment, the KA 802-focused Family Science program has realigned its strategic objectives, focusing on high priority issues in family strengthening (parenting, aging, child care) for national impact.
- Examples of focus in this portfolio which demonstrate the agency's attention to issues, topics, and critical needs of the nation are highlighted below:
 - In response to the global economic crisis, and especially high unemployment, low savings, and rampant mortgage foreclosures in the US, the Financial Security for All Community of Practice developed a focus area on *Managing in Tough Times*. This set the stage for a response by www.extension.org for all audience target areas – individual and family, communities, and farm/ranch operations. The Cooperative Extension System responded in a few short weeks by posting a specific area on eXtension devoted to the financial crisis.
 - An example of focus in this portfolio that demonstrates the agency's attention to the important topic of aging and critical needs of the older rural America is funding provided through the Rural Health and Food Safety Education Program Grant in 2007. This grant emphasized aspects of quality of life and health for older adults living in rural areas. Seven grants were awarded and each includes targeted programs in Extension.
 - In addition to the programmatic efforts specific to KA 724 (Healthy Lifestyles), this program is well integrated with KA 703 (Nutrition Education Knowledge and Behavior) as discussed in the "Nutrition and healthier Food Choices Portfolio" as well as KA 802, Human Development and Well-being; and KA 805 Community Institutions, Health and Social Services of this portfolio.
 - Fourteen new projects with 805 emphases began in 2007 to include 2 NRIs, 3-3D grants, 3 Small Business grants, 3 other Extension grants, and 3 other grants. These primarily target underserved populations in rural communities. Key areas of focus continue to be health and family well-being, but noted for 2007 attention

- to web-based technology and its infrastructure and economic development in communities.
- CSREES Knowledge Areas 607 and 801 derive success by focusing research, education, and extension efforts on the Financial Security Program with specific audience targets of youth, persons preparing for a financially secure later life, and those who are financially vulnerable.
 - KA 724 focuses attention on the health aspects of quality of life in rural America. In response to the CSREES strategic action “to sponsor research on policies and programs addressing circumstances that impact the well-being of individuals, families and communities,” five new projects began in 2006 with a KA 724 emphasis. These include 1 integrated NRI project and 3D Grants with underserved individuals in rural communities.
 - Likewise, 11 new projects with KA 805 emphasis began in 2006 to include 3 NRIs (one multi-state), 1- 3D grant and 7 other or special grants and primarily target underserved populations in rural communities. NPLs will continue efforts to foster multi-state and multi-disciplinary projects with nutrition, family well-being, community institutions and health and human services to help prioritize these critical emphasis areas.
 - As a critical issue identified by the U.S. Surgeon General in his development of a Healthy Housing Call to Action, KA 804 is focusing on research, education, and extension around affordable, healthy, safe, durable (including disaster safe), and energy efficient housing.

Emerging Issues:

Although the panel felt the portfolio as a whole identified many contemporary and/or emerging issues, they also felt the documentation of these issues, as presented in the self-review document, was inadequate. From what the panel gathered, there does not appear to be a clear-cut, systematic method, that CSREES-F+S is able to use to sort out and identify the most critical issues. The panel further believes that the detailed articulation provided by the states on critical issues is largely missing from the self-review document, the presentations by NPLs, and the other evidentiary materials. Communication between the NPLs and states can be improved and it is suggested that NPLs, the administrators, and the states find new ways to communicate so that solicitation of input from partners can be enhanced.

Note: The primary role of the NPL Liaison is to create an informed partnership dialogue in order to better represent CSREES and serve as a resource and information conduit for the Land-Grant College and University system. The Liaisons gather information from their assigned state(s) about issues and concerns that may require agency level attention and respond to or direct inquiries about agency administrative and program oversight issues to the appropriate person(s).

Integration:

Given the fact that CSREES is explicitly mentioned in this dimension, the panel focused scoring on CSREES-F as the central agency. This score does not reflect what is occurring at the state level. The panel scored CSREES-F as moderately integrated. First, the panel wanted to note that new grant proposal criteria requiring integration are greatly helping

CSREES-F deal with this issue (e.g., AREERA legislation has required that 25% of the resources be spent on integrated projects).

Recommendations:

While the panel believes CSREES-F has responded to this requirement, additional improvements can and need to be made. The scope of the portfolio is so broad that it is difficult for it to be fully integrated. This may be dealt with if NPLs are able to become more proactive rather than reactive. The panel suggests NPLs take initiative to integrate their work beyond what is required.

In regard to this review process itself, the panel felt the self review document they were provided did not adequately address education and teaching activities. The panel recognizes that these activities were discussed in Portfolio : Economic and Business Decision-Making but stresses that they need to be included in this review. For example, there is essentially no mention of how current students are able to be involved in current projects through internships and scholarships. This is critically important. Addressing these issues in support of the aforementioned legislation will allow the portfolio to progress in this dimension of integration.

Portfolio Response:

- Integration in the portfolio is being addressed by NPLs at both functional and programmatic levels:
 - Programmatically, CSREES has initiated integration of the Financial Security Program with other agency-led programs, such as farm financial management, family caregiving, aging, nutrition education to low-income families, and small farms.
 - Coordinating the Family and Consumer Sciences Futuring for Families Think Tank, NPLs in housing, family economics, and family science are bringing together multi-disciplinary system faculty and external partners to develop an integrated long-term strategic plan to address critical and emerging family and community needs. CSREES maintains a monthly electronic newsletter, *Family Economics News*, that reaches nearly 1,000 Extension educators, resident education faculty, and researchers in the Land-grant University System. There are sections in the newsletter that focus on research, education/teaching, and extension/outreach, which creates overall knowledge about work in each of the function areas. In addition, the www.extension.org/personal_finance site was a leader in incorporating a research briefs section.
 - From a functional perspective, both KA 724 and 805 cross-cut effectively within this Portfolio as well as with components of the Nutrition Portfolio showing that in fact a number of projects are integrated as to knowledge area. In addition, there are 3 active or new multi-state projects classified with KA 724 and 10 active or new multi-state projects classified with KA 805 each with research, extension and/or education components.
 - In July 2007, CSREES NPLs in Family Economics, Family Science, and Housing and Indoor Environments hosted a “Futuring for Families” (FFF) Think Tank in Atlanta, Georgia to:
 - Understand the benefits of addressing family issues from an interdisciplinary perspective;

- Gain exposure to integrate extension programs with potential for national reach;
- Frame priorities for program leadership at the national, state and local levels.

The think tank was held as a preconference to the National Extension Family Science Specialists' Biennial Conference. Hosted by the College of Family and Consumer Sciences at the University of Georgia, specialists and administrators from all FCS disciplines were invited to attend. FFF attendance included 61 Family Science Specialists, eighteen Administrators, six Housing Specialists, five Family Economists, two Nutrition Specialists, and one Health Specialist. NPLs and administrators from CSREES' Families, 4-H, and Nutrition; Economic and Community Systems; and Plant and Animal Systems units also participated. At the event opening, attendees heard presentations on how these high-priority concerns can be addressed using an integrated, collaborative approach. Extension practices and models applying interdisciplinary approaches to address family challenges were featured as examples. System partners then assisted in facilitating the FFF event, with discussions and group consensus captured in graphic recordings by Visual Logic of Atlanta. A resulting article, posted on the CSREES website and distributed to the partnership, synthesized the results of the FFF process, links to graphic recordings, and provides a matrix of programs that serve as examples of successful integrated programs in the partnership.

- With respect to concerns about adequately addressing education and teaching activities:
 - CSREES funded eight 1890 land-grant universities to design and deliver a family financial planning certificate program www.1890fcsdia.org. This model continues work of the Great Plains Distance Education Alliance www.gpidea.org on the family financial planning master's degree. The GP-Idea Family Financial Planning Program had 163 active students as of January 2007, has graduated 66 students with master's degrees and 17 with certificates and predicts an additional 24 graduates by the end of 2007. Some students are Extension educators. Research on household asset-building is incorporated into the class content.
 - SERD's grant programs strengthen agricultural and science literacy in K-12 education, influence student's career choices toward agricultural subjects, strengthen higher education in the food, life and agricultural sciences, and train master's and doctoral-level students as future educators and scientists in agricultural sciences, to include health sciences. During 2006, a SERD funded grant, Urban Agricultural Initiative focused on people and communities, with a goal to increase student awareness of global food and health issues.
 - NRI projects supported by CSREES frequently include financial support for graduate students, postdoctoral researchers and sometimes for undergraduate students to work on human nutrition research and integrated projects. Many of these projects provide support for undergraduate student workers because they are so labor-intensive, but tracking undergrad support in CREEMS does not begin until 2007.
 - Although the Healthy Indoor Air for America's Homes and Healthy Homes programs are basically funded as outreach/extension programs, these two

programs have been the impetus for research and higher education programs in air quality and healthy homes. For example, interior design undergraduate classes at Auburn University, with funding from Healthy Homes, designed the healthy interior for the Tuskegee House on Tuskegee's campus. As a result of their work, several states have developed research programs directly related to their outreach activities. At the 10th anniversary celebration of the Healthy Indoor Air for America's Homes program in Denver in 2005, separate presentations were made highlighting the outreach/extension, research and education activities resulting from this program. The Healthy Homes funds have also been used to support graduate student attendance at the annual Housing Education and Research Association annual meetings in 2005 and 2006.

Multi-disciplinary Balance Recommendation:

The panel felt that the self-review document did not provide sufficient relevant information to allow for the evaluation of this dimension. The panel noted that while some multi-disciplinary examples were provided, the self-review document did not do an adequate job of illustrating what the panel believes to be the breadth of true multi-disciplinary projects. Also, as per their presentation in the discussion of multi-disciplinary balance in the Criteria and Dimensions section of the self-review document (Section IV, pp. 264-265), the panel noted that multi-state projects are not necessarily multi-disciplinary. Given these difficulties, the panel brought to this scoring dimension their own knowledge of the existence of true multi-disciplinary projects contributed to by CSREES-F in support of this portfolio. They were thereby able to rate the work of CSREES-F+S as highly balanced.

Portfolio Response:

- CSREES program leadership is working to build linkages across portfolios. One example is financial management for the farm business and the farm family. Efforts are underway to obtain CSREES seed money was obtained in FY 2007 to fund articulation of the joint research base, identify successful multi-disciplinary programs underway, and develop an action plan for increasing the reach of learning opportunities linking farm and farm family financial management.
- NPLs continue to work on this dimension and to provide sound examples of multi-disciplinary balance in the system. Of particular note is the work conducted through the eXtension Initiative. The initiative promotes the idea of multi-disciplinary balance through Communities of Practice, such as the Family Caregiving CoP, which is comprised of over 100 faculty and educators from disciplines addressing 9 specific content areas impacting eldercare. These include Caregiving and Disasters, Community Development, Employed Caregivers, Financial Management, Health, Housing, Nutrition, Relationships and Well-being, and Rural Family Caregiving.
- The Extension Disaster Education Network (EDEN) includes representation from throughout the US (all 50 states and several territories) and diverse disciplines including housing, health, 4H and Youth, communication, plant and animal sciences, nutrition, community development, family science and family economics.
- Review panels appointed for the Human Nutrition and Obesity subsection of the NRI (31.5) are among the most multidisciplinary of all the NRI review panels. They reflect the multifaceted nature of the problem of obesity and now include elements

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specific to this portfolio: family life, development and well-being, especially of children and the older adults and healthy lifestyles. The panelists and the ad hoc reviewers include research, extension and industry professionals with expertise in nutrition, human development, education, communication, food science, public health, medicine, economics and technology.

- Funding provided through the Rural Health and Food Safety Education Program Grant in FY 2007, emphasizes quality of life and rural health issues pertinent to older adults and incorporates multidisciplinary priorities. Seven grants were awarded and each includes targeted programs in Extension with programmatic efforts specific to KA 703, Nutrition Education and Behavior; KA 724, Healthy Lifestyles; KA 802, Human Development and Family Well-being; and KA 805 Community Institutions, Health and Social Services.
- KA 801 and 607 – Managing in Tough Times (MiTT) is a new national Extension initiative designed to provide educational resources and materials to be used in community-based learning with individuals/families, youth, community leaders, and farm/ranch operators. A directory of information will be available on a new site called MittNet. This approach to addressing the learning needs of various target audiences affected by the current financial crisis is a model for inter-disciplinary work.
- KA – 804 The Home Energy eXtension COP project represents 65 members who represent a variety of disciplines. In addition it is aligned closely with the Farm Energy and Sustainability eXtension COP. Energy programs are multi-disciplinary with all units at CSREES

Quality:

The panel operationally defined quality as whether the *portfolio focused on the “right things” and contributed to significant outcomes (in contrast to outputs.)*

Significance:

The panel was disappointed with the evidence provided in the Portfolio Quality of Life in Rural America self-review document to support its claims of long-term, significant outcomes. However, the panel also recognized that this issue may be clouded by the lack of a good reporting system, a well structured database, and the fact that states are not consistent in the format they use when reporting. (It was noted that the CSREES-F+S did not have a good scientifically-based system to collect data during this review period). The panel felt that, while some significant findings surely exist, the self-review document did not address them in any systematic fashion.

Recommendations:

There was a major concern that CSREES–F+S needs to move from counting outputs to developing and using outcomes measures. Outputs simply quantify the number of programs delivered, persons in attendance, publications produced, or other such measures. These do not, in and of themselves, ensure the goals of enhancing the quality of rural life are being met in any significant way. Only carefully designed outcome evaluations can determine if strategic goals are reached.

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Further, there was a major concern regarding the lack of consistency and rigor of reported measures, and the quality of data used to determine whether there were significant outcomes (in contrast to outputs).

The panel was concerned about the latitude given to stakeholders in how they report data (i.e., success stories are trumpeted but failures may not be mentioned). CSREES-F must exert leadership and define a minimum level of rigor to be used in data analysis and reporting. This will allow CSREES-F to amass a body of data that may be used to effectively evaluate long-term programmatic outcomes. On the other hand, CSREES receives reports from grantees annually but seems to have limited ability to use those reports effectively in either the integration of the information or in the dissemination of it to stakeholders (from Congress to the citizens). For this reason, CSREES-F+S needs to make a concerted effort to both collect better data and make better use of reported data.

In summary, in regard to this dimension of “Significance,” the panel felt the portfolio showed only some evidence of significant findings. It was noted that data collection efforts during the 2000-2004 time period were not systematic and could not easily be used by CSREES-F+S. However, the panel was encouraged by new efforts such as *Plan of Work* and *OneSolution* and is hopeful that these will lead to positive improvements in the documentation of significant findings. Concerns were raised that some of the evidence provided by the States to CSREES-F was not incorporated into this review process. If information is requested of the States, it should be used in an appropriate fashion.

Portfolio Response:

Portfolio-related examples of significance are demonstrated in the following ways and address efforts to build capacity and move toward the effective development and use of outcome measures based on carefully designed evaluations:

- Efforts to improve the evaluation component of funded projects and partnerships related to health are ongoing.
- Through a national partnership with the American Cancer Society, the Centers for Disease Control and Prevention, and the National Cancer Institute, educational efforts to increase breast and cervical screening rates in eight high-mortality states are currently being evaluated to assess the effectiveness of evidenced-based interventions that have been used to increase cancer screening rates.
- A partnership with the America On The Move Foundation (AOMF) has the potential to provide CES staff at the state and local levels the ability to design and complete an evaluation component for walking programs.
- CSREES and land-grant university partners, in partnership with the Consumer Federation of America and *America Saves*, led thirty-two local campaigns in 20 States in 2006 that enrolled 15,401 Savers who planned to save nearly \$1.5 million. *America Saves* is targeted to low- to middle-income Americans.
- CSREES and land-grant university partners, through the national initiative *Financial Security in Later Life* reported a group of over 7,000 individuals who completed initiative –related programs in 2006 had a total of \$6,501,945 of financial impact – dollars saved, debt reduced, new dollars invested.

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- Through a national consumer education program-Healthy Indoor Air for America's Homes, the 2006 evaluation showed that:
 - 55,108 homes were tested for radon and 9,044 were mitigated.
 - 40,980 people stopped exposing their children to second-hand smoke.
 - 29,925 people tested their homes for lead.
 - 33,825 people installed carbon monoxide detectors in their homes.
 - 38,479 selected and used home pesticides more wisely.
 - 27,272 removed mold and mildew from their homes.
 - 186,025 made behavior changes to improve indoor air quality.
- As eXtension Communities of Practice develop in the Family Sciences, carefully designed evaluation components in family caregiving, Just in Time Parenting, and Better Kid Care are being implemented.
- The NPL for Youth Development Research is involved in several projects that address how to move from counting outputs to developing and using outcome measures.
- CSREES requires annual Plans of Work and Progress Reports from land-grant universities which are reviewed by CSREES state liaisons. One of the review criteria is that there is evidence of adequate stakeholder input in the development of formula-funded research and Extension/outreach plans.
- NPL Liaisons are now assigned specific states and will continue to monitor State Plans of Work and Annual Reports to determine the timely and consistent submission of reported outcomes. This state-Federal feedback system is used to make adjustments as needed to keep portfolio related projects/activities progressing in a timely manner.
- In addition, CSREES continues to utilize the comprehensive reporting system, CRIS to track progress of projects and assure that activities and accomplishments proceed according to proposed and approved timeframes.
- CSREES NPLs frequently speak with partners and key stakeholders via phone and in person on the importance of timely reporting of outcomes data. To encourage such reporting, NPLs may include under "Selected Results and Impacts" a statement about a particular project on a portfolio-related CSREES web page. This also provides a venue for sharing of the information to wider and more diverse audience. The Agency has also designed and implemented training to enhance NPLs understanding of strategic planning, performance measurements, and evaluation. Some efforts have already begun to identify measures to be used in the future.
- In an effort to enhance accessibility of data from state accomplishment reports, CSREES' Planning and Accountability staff have mined reports and provided the agency with 2007 Annual Report Outcome Data by KA located at <http://pow.csrees.usda.gov/Outcomes.htm>. There is also a link to this page on the main CSREES AREERA Plan of Work information page at: <http://www.csrees.usda.gov/business/reporting/planrept/plansofwork.html>. This resource enhances CSREES NPLs ability to access and provide appropriate evidence by KA for a wide variety of uses, including the annual portfolio review.
- KA 801 and 607 – The National Endowment for Financial Education (NEFE) has funded a nationwide program evaluation to determine how youth take positive financial action as a result of participating in the NEFE® High School Financial Planning Program. CSREES and NEFE have a Memorandum of Understanding to

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revise, deliver, and evaluate the program. In partnership with the Consumer Federation of America for America Saves and America Saves Week, data is available related to how much money and for what purpose individuals and families plan to and actually do save.

- KA 804 - We continue to document impacts of the Healthy Homes program as was documented in previous reports.

Stakeholder/Constituent Inputs:

Although the panel scored the portfolio as having many stakeholder/constituent inputs based on their personal knowledge, these were not adequately represented in the self-review document. The panel is aware that the states actually do utilize a variety of avenues to provide stakeholder input such as “town hall” meetings, surveys, etc., but clear reference to these techniques was not included in the self review document.

Recommendations:

Communication with stakeholders, beginning at the community level, is critical. The panel noted that while Deputies communicate with state extension directors, many times the NPLs do not. The panel felt that establishing and increasing two-way channels of communication is of critical importance to improving efforts in this portfolio.

Additionally, CSREES-F+S needs a uniform system for reporting so it is better able to extract the information needed for planning. The gathering of input is not sufficient, this input must be used.

Portfolio Response:

Stakeholders are in a unique position to inform CSREES of their needs and interests.

Examples of stakeholder input at the federal, state, and local level, as well as evidence of the expansion of two-way communication include the following:

- CSREES has made painstaking efforts to develop mechanisms for soliciting and implementing input from stakeholders at all levels. These efforts help ensure that stakeholders appreciate their value in the partnership. For example:
 - NPLs develop, and participate in a wide variety of professional opportunities for partners to dialogue about current and emerging issues related to this portfolio. Feedback from partners, both internal and external is incorporated into NPL planning.
 - Since the inception of the NPL Liaison Program, NPLs are in continuous contact with their assigned states, dialoguing with administrators, faculty and staff to assess climate and gauge stakeholder challenges and opportunities. Multiple liaison site visits have been conducted through this program over the past year and best practices and processes are shared among NPLs to strengthen the CSREES/LGU relationship.
 - In a local level example-CSREES, together with the Association for Financial Counseling and Planning Education (AFCPE), organized a pre-conference to the AFCPE Annual Conference in 2006 and 2007 resulting in gathering stakeholder input from more than 100 Extension educators.
 - National 4-H Learning Priorities: National 4-H Headquarters and 65 Extension 4-H youth development professionals drawn from all facets of the movement and 30 states are working together to create access to consistent, high-quality, relevant,

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learner-centered professional development learning opportunities based on the National 4-H Learning Priorities for 2007-2012.

CSREES also recognizes its role as a conduit of current research information. CSREES works closely with other agencies, organizations and land-grant universities and provides a mechanism to distribute information to stakeholders and partners. A wide variety of CSREES listservs, monitored and moderated by NPLs managing this portfolio, provide an excellent means for systematic distribution of materials.

- See: *What Others Are Doing* and *Prioritizing Stakeholder Input and Allocation* located in the Portfolio Results Section of this report.
- KA 801 and 607 – CSREES organizers a pre-conference to the annual conference of the Association for Financial Counseling and Education (AFCPE). This results in significant stakeholder input from more than 100 Extension educators each year, which generally represent about 40 States.
- KA 804 Continuous dialog occurs between the Housing and Environment NPL and state leaders and specialists through newsletters, special notes, conference calls, webinars, professional meetings and conferences, and public appearances.
- KA 724 -In 2008-09, the *Nutrition and Health Committee for Planning and Guidance* was formed to strategically position Extension programs for the future with input from LGU stakeholders at the state and community levels. Committee members represent all regions of the county as well as 1862 and 1890 institutions. They provide expert opinion to NPLs regarding healthy living policies and programs to strategically position the Cooperative Extension System (CES) for the future. They seek input from local and state constituents/stakeholders on topics related to communication as well as evaluation and training. During 2008-09, the Committee's focus was:
 - Identify Evaluation indicators to capture the outcome of interventions to improve nutrition, health and physical activity;
 - Recommend a formal Curriculum oversight process and format to facilitate a national review and dissemination system of CES nutrition and health curriculum resources;
 - Identify needs, appropriate partnerships, current resources, and shared experiences related to nutrition and physical activity educational materials and training for Extension program leaders; and
 - Establish communication and linkage to resources to foster dialogue and sharing of these resources nationwide.

Portfolio Alignment:

The panel found much of the portfolio to be well aligned with the current state of science. The data reported between 2000 and 2004 were significant. However, the panel questioned how CSREES-F (and therefore how the panelists themselves) would know if programs were always consistent with the current state of science if good research and evaluations were not conducted.

Recommendations:

The panel strongly believes that CSREES-F should make funding a high-quality evaluation system a priority and that leadership must be provided by the NPLs to promote consistent system-wide evaluation. Beyond just doing the evaluation, the panel stresses the importance of a feedback loop. CSREES-F+S needs to work together to disseminate

the findings of evaluations so that the portfolio can continue to be well aligned with the current state of science and that ineffectual or lesser priority programs can be reduced or eliminated.

Portfolio Response:

- To assure the Financial Security Program is aligned with the current state of science, CSREES collaborated with researchers from eight universities to define the science and prepare a commentary accepted for publication in the summer 2007 issue of *Financial Counseling and Planning*, a professional journal. The research base guided development of project-specific logic models (e.g. NEFE® High School Financial Planning Program®, America Saves) and identification of impact indicators.
- Examples of evaluation processes and outcomes are summarized in Appendix F of this report.
- KA 801 and 607 – In a continual effort to articulate the science base that undergirds personal and family financial planning, CSREES and the US Treasury coordinating a two-day National Symposium on Financial Literacy and Education in October 2008. Twenty-nine scholars from public and private universities and other research organizations took a comprehensive look at what is known and gaps in research. As a result, 10 research priorities were articulated and widely communicated to researchers, foundations, and other entities interested in affecting financial literacy policy, education, and practice.

Appropriate Methodology:

The panel believed that the portfolio demonstrated that CSREES-F+S usually applied appropriate/cutting edge methodology. Panel members recognized the peer-review process for research proposals assures current methodologies are being used.

Recommendations:

Technology is ever changing and therefore it is necessary for everyone to keep up to date on methodological advances. It was recognized that many personnel involved in CSREES projects need help in using cutting-edge technology and pedagogical advances. The panel recommends that there be professional development activities for and/or mentorship for individuals who need to upgrade skills in this area.

Portfolio Response:

- Professional development of NPLs in areas such as the use of appropriate methodology and cross-cutting technology are incorporated into annual Individual Development Plans for the NPLs managing this portfolio. Examples include the following:
 - CSREES personnel developed skills in social marketing through formal training sponsored by the NASD Investor Education Foundation (now renamed the FINRA Investor Education Foundation) and the American Marketing Association.
 - The NPL for Youth Development Research is working with a group of researchers at and-grant universities to develop strategies for expanding a web-based system for accessing quality, reliable and valid youth development/out-of-school time program measures.
 - National 4-H Headquarters' released the results of a national survey of the 4-H workforce which provides baseline data about 4-H staffing structures and salary

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- ranges across the United States. State Extension 4-H program leadership--from all 50 states--responded to the survey and results are reported in eight areas--(1) Profile of respondents; (2) Current 4-H staffing structures; (3) Staffing trends and changes since 1990; (4) Academic degree requirements; (5) Compensation levels; (6) Academic and other preparation; (7) Ideal staffing models; and (8) Current and future challenges.
- In addition to participating in multiple professional development opportunities through their professional organizations, NPLs and agency staff access the AgLearn system-a technology based online system that provides a consistent and high quality source for professional development for NPLs and agency staff, who are required to take specific courses annually and are offered multiple opportunities for advanced technology instruction and career development training.
 - NPLs and program specialists involved with this portfolio use Breeze technology extensively for professional development as well as for instruction, information exchange, and for competitive grant review.
 - Breeze technology was used to administer a “virtual panel” for the review of proposals submitted to the Rural Health and Safety Education Program. Six panel reviewers located across the nation were connected with NPL staff in Washington, DC for this review. The use of this technology not only increased the efficiency of the review but also reduced panel costs related to travel and housing.
 - NPLs and staff use the AgLearn (<http://www.aglearn.usda.gov/>) system to update their professional skills. The Agriculture Learning (AgLearn) Service is USDA’s Learning Management System. AgLearn specifically addresses USDA employees learning needs and organizes USDA agency specialized training courses into a searchable catalogue. The system will also house the training records of each USDA employee and include Individual Development Planning.
 - Multiple Breeze sessions introduced Extension personnel participating in the Family Caregiving Community of Practice to the technologies associated with adding content to eXtension.
 - KA 801 and 607 – The 2009 AFCPE Extension Pre-conference will focus on “Using Social Networking (e.g. Facebook, YouTube, LinkedIn) in Financial Education.”
 - KA 804 - Home Energy COP is based on good science and everything in it is peer reviewed for content and accuracy. The 2009 Surgeon General’s call to Action to promote healthy Homes (of which USDA/CSREES was one of the authors) was based on current scientific research.
 - KA 804 - Webinars are being used extensively to communicate about Home Energy issues that are current such as energy tax credits, solar and alternative energy and stimulus opportunities.

Performance:

The panel operationally defined performance as whether or not CSREES-F staff did a good job, and whether or not the portfolio was comprehensive.

Portfolio Productivity Recommendation:

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Given the fact that CSREES is explicitly mentioned in this dimension, the panel focused scoring on CSREES-F as the central agency. This score does not reflect what is occurring at the state level. While the panel recognized NPLs are all extraordinarily busy, engaged in many activities and are quite productive, they did not believe this productivity was demonstrated through the self-review document. While the panel recognizes NPLs are doing the best that they can, they themselves (in the self review document) describe the reporting system as unsystematic and incomplete. It is because of these recognized flaws in the system that the portfolio could not be rated as fully successful. Two specific flaws noted were:

- a) Reporting extension productivity is currently problematic because the system does not fully account for it.
- b) Formula funds help support the infrastructure that affords the states the ability to conduct relevant programs and activities but they too are not accounted for under the CRIS system.

The panel also recognized that CSREES-F is often a rather minor funder/contributor to many of the states' programming efforts. It was understood that this can then set up barriers for the creation, planning, and ultimately reporting on productive activities. The panel would like to note that this reaction is based upon the review period of 2000-2004 and recognizes lessons have been learned and improvements are already being implemented. They are hopeful that there is enough expertise to push the new State Plan of Work systems forward and improve the ability of the portfolio to demonstrate productivity for future panel reviews. The new electronic state plan of work and state reports are constructed along the logic model, making it easier to tie outcomes to activities. This will make reporting productivity much easier. The reports are due by April 2008.

Portfolio Response:

- Refer to agency response section of this report.
- Continued strides have been made agency wide to improve the current reporting systems. One such example is the Leadership Management Dashboard. A Dashboard is a visual display of the most important information National Program Leaders need to monitor their program information at a glance. Just as an automobile's dashboard provides all the critical information needed to operate the vehicle at a glance, the NPL dashboard serves a similar purpose, assisting NPLs to make strategic decisions, run the daily operations of a team, or perform autonomous tasks. The Leadership Management Dashboard has the potential to improve monitoring by NPLs of research, education and extension programs within their area of subject matter expertise. Continued changes to the Dashboard program are expected to provide improved monitoring capabilities.

Portfolio Comprehensiveness:

Of all of the dimensions in this review, the panel struggled most with how to evaluate this dimension. In scoring it the panel operationally defined comprehensiveness as reflective of depth and breadth. The panel recognized breadth quite easily (and also noted concern that it was too broad and too reflective of what some referred to as a "scatter-gun" approach).

This then gave rise to discussion as to whether the portfolio actually contributed to enhancing rural life along the most critical dimensions. The consensus of the panel was that the portfolio was moderately comprehensive (quite broad yet not deep enough). The panel discussed ensuring that model programs, with truly significant findings, be disseminated more broadly before new programs of unproven or questionable outcomes are implemented.

Recommendations:

It was their stance that CSREES-F should focus on doing a few things very well rather than many things satisfactorily.

As a caveat, the panel discussed the dimension in relation to what it termed “current realities.” This judgment of comprehensiveness was done within the context of current levels of funding. Given the current dollars available, the panel believes that it simply is not possible for the portfolio to successfully achieve both breadth and depth. The portfolio needs increased funding, more and better strategic planning and thinking (tied to thoughtful outcome measures), and greater focus on critical issues.

Portfolio Response:

In addressing the panel recommendations on portfolio comprehensiveness and the concept of *doing a few things very well rather than many things satisfactorily*, the following examples apply:

- **eXtension:** As technology around the eXtension Initiative has emerged, NPLs are embracing tools that were previously unavailable to them as they attempted to focus portfolio-related work at the national level. Through eXtension- a 24/7/365 Internet-based resource designed to provide access to objective, research-based programs solving real problems in real time, NPLs are helping to bring together Communities of Practice around critical needs for the broadest national impact.
 - CSREES used *Financial Security in Later Life (FSLL)* model programs as part of a recent mandate that federal employees receive personal finance education. All of the programs originally in the Financial Security in Later Life program (www.csrees.usda.gov/fsll) have been transitioned to www.extension.org/personal_finance. A gap analysis has been completed which identified housing finance as a priority. A team was established to include a housing section on eXtension. Funding has been obtained to support teams in the development of other resources in high demand by the American public.
 - Additional Communities of Practice in this portfolio include Just In Time Parenting, Family Caregiving, Child Care Provider Training, EDEN, and Youth Literacy in Science, Engineering, and Technology.
- **Strategic Planning:** During 2006, Family, 4-H and Nutrition Unit NPLs and others participated in Strategic Planning to focus the work of the unit. Where possible, efforts have been made by NPLs in Human Nutrition and Family Sciences to effectively link healthy lifestyles with healthy rural communities and health systems within this portfolio.
- A National 4-H Curriculum Summit is being planned for 2007. The summit will examine innovations and strategies that are successful at developing high-quality curricula which support the 4-H mission. The goal of this national meeting is to

provide momentum for 4-H faculty and staff to foster improvements as we transition our national curriculum processes.

- In partnership with National 4-H Council, the NOYCE Foundation has provided seed funding for Science, Engineering and Technology. The funding will be used to develop an action plan with a goal of reaching 1,000,000 new youth through science, engineering and technology. Components of the plan will include: infrastructure, professional development, training and technical assistance, and curriculum modification and development.
- NPLs in CSREES' Families, 4-H, and Nutrition Unit have been collaborating with partners in both the land-grant universities as well as National 4-H Headquarters' private, non-profit partner, National 4-H Council, to identify more funding and greater focus on critical issues.
- **Targeted Projects:** Continued efforts to engage in partnerships, such as the Medicare Education Project in partnership with the Centers for Medicare and Medicaid Services, leverage funding on critically important issues. These partnerships are a major step in bringing effective and efficient community-level interventions and improving communication to rural communities.
- The NPL for Youth Development Research has assembled a team of researchers from land-grant universities and external experts to work on 4-H SET evaluation strategies and models/templates. Ohio State has prepared a report and recommendations regarding educational standards and skills for 4-H SET. This will serve as a guide for developing and evaluating 4-H SET curriculum and programs.
- The Family Science Program is undergoing a strategic planning process to better align this work with agency and departmental goals as well as with issues critical to the partnership.
- The Social Science Academy, an internal CSREES program, provides the opportunity for staff from across the biology, physical, engineering, plant, animal, nutrition, youth development, natural resources, economics, sociology, technology, and food science disciplines to participate in a 10-month training to increase their knowledge and ability to incorporate social science dimensions CSREES programs. The goal of the Social Science Academy is to bring together social science researchers with scientists who work in the area of natural resources and other non-social sciences to better understand how these different sciences can inform each other.

Portfolio Timeliness:

This dimension was very difficult to evaluate given the extremely limited information provided. Despite this, there was some knowledge provided by the panelists about funding in the states. With this knowledge the panel arrived at a consensus that *some* projects achieve closure on time.

Recommendations:

In regard to future reviews, the panel suggests that there be more clarity in the definition of this dimension and also, more information provided to the panelists. While timeliness is certainly of value, the panel would like to emphasize that requesting an extension to a program/project is not necessarily a weakness. Extensions can be very valid and in effect

provide greater contribution to science in the long term. This should be taken into consideration when clarifying this dimension.

Portfolio Response:

- NPLs managing this portfolio are working with the CSREES Office of Planning and Accountability and the partnership to address portfolio timeliness with more clarity in the definition of this dimension in future reviews. Note that special projects in this portfolio must be completed on time.
- One Solution seeks to address the shortcomings of the existing reporting environment through an integrated approach that ties together reporting systems and processes across all CSREES programs. It will fulfill three major goals:
 - Simplify reporting and reduce burdens for grantees;
 - Improve the quality of accountability data and better equip the agency to meet increasing performance and budget reporting expectations; and reduce efforts required to complete reporting-related processes, allowing staff members to focus on program leadership and active, portfolio-based management.
 - NPLs managing this portfolio continue to work with the CSREES Office of Planning and Accountability and the partnership to address portfolio timeliness with more clarity in the definition of this dimension in future reviews.
- KA 801 and 607 – At the direction of the Extension Committee on Organization and Policy, a Managing in Tough Times Core Leadership Team was developed in early 2009. It has created and will train the entire Cooperative Extension System on how to be immediately responsive to target audiences experiencing the effects of the economic crisis.

Agency Guidance:

Given the fact that CSREES is explicitly mentioned in this dimension, the panel focused scoring on CSREES-F as the central agency. This score does not reflect what is occurring at the state level.

Recommendations:

This dimension needs to be more clearly defined for the purpose of this evaluation. Both management and leadership are listed in the scoring criteria, but *management* and *leadership* are two very different functions.

Overall, given the knowledge the panel brought to the review, what was presented in the document, and given the time frame of 2000 - 2004, the panel would evaluate *management* as satisfactory and *leadership* as somewhat weak. The consensus for the dimension as a whole was that CSREES-F performed satisfactorily.

This issue of leadership relates in part to the discussion of accountability below. While the panel did not have detailed budgetary information, it was clear most of the funds allocated by Congress pass through the agency to the states. The states set their own priorities and define their own outcome measures. While the agency has nominal authority to approve or disapprove projects, in reality it holds very little power. Additionally, the panel recognizes CSREES-F has been able to amass a shared portfolio of accomplishment only through aggressive partnering with state networks, other

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agencies and foundations. While the panel does not find this structure problematic, it does raise the question about how much CSREES-F can be held accountable for programs disseminated throughout the broader network. Authority and responsibility are, to a great extent, currently uncoupled within the funding formulas.

The panel compliments all parties on managing to produce positive work given this arrangement. Even so, it is urged that CSREES-F provide leadership within the context of distributed responsibility to ensure priorities are set and emerging issues addressed.

Communication among all partners needs to be enhanced. For example, the panel noted inconsistent and uneven communication methods/frequency/effectiveness across programs. A recommendation is that CSREES-F act as the leader in ensuring that a communication conduit exists from *Federal Government (which includes NPLS) ↔ Regional Consortia ↔ State ↔ Local Communities ↔ Citizens*. The implementation of a more reliable communication conduit will help build a strategic and focused plan that will necessitate new structure and processes, with information flow to other partners (NGOs, universities, local governments). While the panel believes this is a potential strength, some state representatives do not believe the communication is bi-directional at present because of the limited proportion of federal resources available for these programs. It is difficult for CSREES-F to provide leadership when most of the resources are coming from state and other funds. To achieve its mission, seamless and focused flow of information among all stakeholders is essential.

The proposed Plan of Work has been explained as being developed with extensive input from stakeholders. The panel applauds this approach and hopes to see the new Plan of Work system operational soon. Additional input from the panel is that the process itself should include purposeful, in-depth evaluation as an expectation and a requirement for all future programming.

Portfolio Response:

- State liaisons are being encouraged to thoughtfully review State Plans of Work to ensure appropriate use of KAs in program planning, output and outcomes so that in-depth evaluation could be easily conducted when appropriate.
- Targeted external partners are continuously informed and engaged in agency and partnership activities through media and collaborative involvement. CSREES develops a monthly, electronic newsletter called *Family Economics News* to share relevant research findings, effective educational strategies, and resources for funding and sharing program results. The newsletter is circulated to nearly 1,000 faculty, educators, and administrators in the Land-Grant University System and to about 900 external partners who collaborate with CSREES or are interested in our work. This portfolio also contains newsletters on *Housing* and *Family Science* issues of similar distribution and impact. See Appendix F of this report.

Portfolio Accountability:

As discussed above, the panel was concerned that the current system requires CSREES-F to be responsible for decisions over which they have little direct authority. Given the

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current funding and goal setting structures, the panel regarded *accountability* as actually dispersed; yet, the partnership system itself puts the onus on CSREES-F.

Recommendations:

The panel believes the onus should be shared with the partnership states that receive the funding. The system does not capture variations in accountability among the states or allocate accountability between CSREES-F and the state partners. It also says nothing of all the other funding partners. For these reasons the panel scored the portfolio as having a moderate level of accountability.

Portfolio Response:

- CSREES requires annual Plans of Work and Progress Reports from land-grant universities which are reviewed by CSREES state liaisons as a way to ascertain accountability from a “dispersed” perspective. Members of this portfolio team serve as liaisons to 16 states. Although continued efforts are being made to capture variations in accountability among the states and/or allocate accountability between CSREES-F and the state partners, at this time it is difficult to do.
- Improved strategies were developed in 2007 to better facilitate collection of data from the state annual reports by the Office of Planning and Accountability. The quality of life portfolio team reviewed the summary documents and, as appropriate, obtained targeted information from states. Members of the portfolio team serve as NPL State Liaisons to 16 states which provide opportunities for in-depth analysis of programming efforts and challenges.
- NPLs also participate in or lead CSREES Institutional Reviews to better gauge, understand, and support partnership opportunities and needs.

Section V: Self-Assessment

Portfolio Scoring

Criteria	Panel Score	2007 Score	2008 Score	2009 Score
<i>Relevance</i>				
1. Scope	3	3	3	3
2. Focus	2	2.5	2.5	2.5
3. Contemporary and/or Emerging Issues	3	3	3	3
4. Integration	2	2.5	2	2.5
5. Multi-disciplinary Balance	3	3	2.5	2.5
<i>Quality</i>				
1. Significance of Findings	2	2	2.5	2.5
2. Stakeholder/Constituent Inputs	3	3	3	3
3. Alignment with Current State of Science	3	3	3	2.5
4. Appropriate and/or Cutting Edge Methodology	2	2	2.5	2.5
<i>Performance</i>				
1. Portfolio Productivity	2	2	2.5	2.5
2. Portfolio Comprehensiveness	2	2.5	2.5	2.5
3. Portfolio Timeliness	2	2.5	3	3
4. Agency guidance	2	2	2.5	2.5
5. Portfolio Accountability	2	2	2	2.5
<i>Overall score *</i>	81	85	90	90

* The overall score is based on weighted calculations

2009 Rational for Score Change

Relevance

- *Scope*: Remained the same at 3.0
Justification: No comments were made by the Portfolio Team on this dimension during scoring session.
- *Focus*: Remained the same at 2.5
Justification: Using the research-based community capital framework greatly enhances the focus of the work included in this Portfolio. Although the work is articulated in an integrated manner, the Portfolio Team felt there was more work

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to do in refining top priorities based on the nation's most critical issues. Quarterly meetings are planned for strategic thinking and planning.

- *Contemporary and/or Emerging Issues*: Remained the same at 3.0
Justification: No comments were made by the Portfolio Team on this dimension during scoring session.
- *Integration*: Increased from 2.0 to 2.5
Justification: The reorganization of portfolio into the capital framework provides great visibility of this portfolio's integration. The Family Science program and Treasury's priority for research are specific examples of portfolio's integration. The Team felt there is a need for increased efforts to more fully integrate across the agency.
- *Multi-disciplinary Balance*: Remained the same at 2.5
Justification: The capital framework emphasis compliments this portfolio's multidisciplinary balance and provides opportunity to improve in this area. NPLs are working together to integrate and align human social science with agricultural sciences.

Quality

- *Significance of Findings*: Remained the same at 2.5
Justification: There has been some progress in area but improvement is needed in regard to obtaining better outcome data.
- *Stakeholder/Constituent Inputs*: Remained the same at 3.0
Justification: The team felt like they were receiving a great deal of input but there is no systematic process in place to use the input in a meaningful way.
- *Alignment with Current State of Science*: Decreased from 3.0 to 2.5
Justification: This portfolio alignment with the current state of science is adequate but could improve.
- *Appropriate and/or Cutting Edge Methodology*: Remained the same at 2.5
Justification: No comments were made by the Portfolio Team on this dimension during scoring session.

Performance

- *Portfolio Productivity*: Remained the same at 2.5
Justification: The team members recognize the high degree of productiveness of this portfolio.
- *Portfolio Comprehensiveness*: Remained the same at 2.5

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Justification: There is a need for continuous and ongoing communication among the portfolio team members. This report reflects what has been done in the past and provides an excellent tool for future planning. The team will start to meet quarterly to plan in a more integrated fashion for future work.

- *Portfolio Timeliness:* Remained the same at 3.0
Justification: No comments were provided. No comments were made by the Portfolio Team on this dimension during scoring session.
- *Agency Guidance:* Remained the same at 2.5
Justification: Lack of human resources and insufficient funding are limiting factors in program leadership and management.
- *Portfolio Accountability:* Increased from 2.0 to 2.5
Justification: This portfolio has increased the accountability of the system to CSREES due to new data collection and reporting systems.

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Appendix A - External Panel Recommendations to the Agency

In response to directives from the Office of Management and Budget (OMB) of the President, CSREES implemented the Portfolio Review Expert Panel (PREP) process to systematically review its progress in achieving its mission. Since this process began in 2003, fourteen expert review panels have been convened and each has published a report offering recommendations and guidance. These external reviews occur on a rolling five-year basis. In the four off years an internal panel is assembled to examine how well CSREES is addressing the expert panel's recommendations. These internal reports are crafted to specifically address the issues raised for a particular portfolio. Electronic versions of both external and internal reviews for all portfolios are located on the Agency's website (http://www.csrees.usda.gov/about/strat_plan_portfolio.html).

Even though the expert reports were all written independent of one another on portfolios comprised of very different subject matter, several themes common to the set of review reports have emerged. This set of issues has repeatedly been identified by expert panels and requires an agency-wide response. The agency has taken a series of steps to effectively respond to those overarching issues.

- **Issue 1: Getting Credit When Credit is Due**

For the most part panelists were complimentary when examples showing partnerships and leveraging of funds were used. However, panelists saw a strong need for CSREES to better assert itself and its name into the reporting process. Panelists believed that principal investigators who conduct the research, education and extension activities funded by CSREES often do not highlight the contributions made by CSREES. Multiple panel reports suggested CSREES better monitor reports of its funding and ensure that the agency is properly credited. Many panelists were unaware of the breadth of CSREES activities and believe their lack of knowledge is partly a result of CSREES not receiving credit in publications and other material made possible by CSREES funding.

Issue 1: Agency Response:

To address the issue of lack of credit being given to CSREES for funded projects, the Agency implemented several efforts likely to improve this situation.

First CSREES developed a standard paragraph about CSREES's work and funding that project managers can easily insert into documents, papers and other material funded in part or entirely by CSREES.

Second, the Agency is in the process of implementing the "One Solution" concept. One Solution will allow for the better integration, reporting and publication of CSREES material on the web. In addition, the new Plan of Work (POW), centered by a logic model framework, became operational in June 2006. Because of the new POW requirements and the POW training conducted by the Office of Planning and Accountability (OPA), it will be simpler for state and local partners to line up the work they are doing with agency expenditures. This in turn will make it easier for project managers to cite CSREES contributions when appropriate.

The Agency has started the process of upgrading the Current Research Information System (CRIS), once upgraded it will be named the CSREES Information System (CIS). The CIS will allow users to access information from the Plan of Work (POW) and new Standard Report in a more effective and efficient manner. In addition to the CIS, the new Annual Reporting system that is based on activities discussed in the POW was launched in 2008.

- **Issue 2: Partnership with Universities**

Panelists felt that the concept of partnership was not being adequately presented. Panelists saw a need for more detail to be made available. Panelists asked a number of questions revolving around long-term planning between the entities they also asked how the CSREES mission and goals were being supported through its partnership with universities and vice versa.

Issue 2: Agency Response:

CSREES has taken several steps to strengthen its relationship with university partners. During the November 2005 National Association of State University and Land-Grant Colleges (NASULGC) meeting in Washington, D.C., Dr. Colien Hefferan announced a new cooperative program entitled the new NPL Institutional Liaison program. The primary goal of this program is to strengthen the relationship between CSREES and its state partners, thus enhancing the effectiveness of the work done by CSREES. Through teleconferences, campus visits, e-mails and other meeting opportunities; CSREES's knowledge and understanding of institutional interests and needs will increase. CSREES is committed to learning more about state research, extension and education activities, strategic plans, and goals.

NPL Liaisons have the following duties:

- Become knowledgeable about the administrative structure budget sources and major program commitments of your institution
- Meet regularly with the CSREES deputy administrator liaison with your region
- Make quarterly phone calls or teleconferences to appropriate university officials in order to create ongoing dialogue of shared interests and needs
- Schedule campus visit/s in order to enhance the partnership
- Serve as the joint reviewers of your integrated annual plans of work from cooperative extension and research
- Identify partnership opportunities within CSREES and other federal agencies to strengthen your programs and assist in meeting your goals

Finally, several trainings that focused on the POW were conducted by CSREES in geographic regions throughout the country. A major goal of this training was to better communicate CSREES goals to state leaders which will facilitate better planning between the universities and CSREES.

- **Issue 3: National Program Leaders**

Without exception the portfolio review panels were complimentary of the work being done by NPLs. They believe NPLs have significant responsibility, are experts in the field and do a difficult job admirably. Panelists did however mention that often times there are gaps in the assignments given to NPLs. Those gaps leave holes in programmatic coverage.

Issue 3: Agency Response:

CSREES values the substantive expertise that NPLs bring to the Agency and therefore requires all NPLs to be experts in their respective fields. Given the budget constraints often times faced by the agency, the agency has not always been able to fund needed positions and had to prioritize its hiring for open positions. In addition, because of the level of expertise CSREES requires of its NPLs, quick hires are not always possible. Often, CSREES is unable to meet the salary demands of those it wishes to hire. It is essential that position not only be filled but filled with the most qualified candidate.

Operating under these constraints and given inevitable staff turnover, gaps will always remain. However, establishing and drawing together multidisciplinary teams required to complete the portfolio reviews has allowed the Agency to identify gaps in program knowledge and ensure that these needs are addressed in a timely fashion. To the extent that specific gaps are mentioned by the expert panels, the urgency to fill them is heightened.

- **Issue 4: Integration**

Lack of integration has been highlighted throughout the panel reviews. While review panelists certainly noted in their reports where they observed instances of integration, almost without fail panel reports sought more documentation in this regard.

Issue 4: Agency Response:

Complex problems require creative and integrated approaches that cut across disciplines and knowledge areas. CSREES has recognized the need for these approaches and has undertaken steps to remedy this situation. CSREES has recently mandated that up to twenty-six percent of all NRI funds be put aside specifically for integrated projects. These projects cut across functions as well as disciplines and ensure that future Agency work will be better integrated. Integration is advanced through the portfolio process which requires cooperation across units and programmatic areas.

- **Issue 5: Extension**

While most panels seemed satisfied at the level of discussion that focused on research, the same does not hold true for extension. There was a call for more detail and more outcome examples based upon extension activities. There was a consistent request for more detail regarding not just the activities undertaken by extension but documentation of specific results these activities achieved.

Issue 5: Agency Response:

Conferences have been conducted to increase the awareness of improved methodologies and reporting systems for documenting outcomes and impacts for the Agency. A CSREES Planning and Evaluation Mini-Conference was held April 23-24, 2007 in conjunction with the Administrative Officers' Conference in Seattle, WA. This mini-conference was designed for those planning programs or engaged in performance measurement and program evaluation. Participants learned about Plan of Work reporting, what CSREES has learned from the 2007-2011 Plans submitted, and how CSREES has used and expects to use information from annual reports and plans.

In addition to the CSREES Planning and Evaluation Mini-Conference, CSREES, in partnership with Texas A&M University, started a bi-monthly CSREES Reporting Web Conference Series (RWC) in February 2008. This series originated from requests for more information on various topics identified at the 2007 CSREES Planning and Accountability Mini-Conference. Topics for the series include:

- Agricultural Research, Extension, and Education Reform Act (AREERA);
- Plans of Work (POW);
- Annual Reports;
- One Solution;
- CRIS (soon to become CSREES Information System (CIS)); and
- Outcome reporting.

The AREERA Plan of Work and Annual Reporting system (POW) made extension-based results and reporting a priority. The new POW includes program descriptions and progress reports limited to four legislatively prescribed lines of funding. POW includes descriptions and annual accomplishments for each subject program. POW is a database application containing a combination of structured data and unstructured text box fields. These reports provide state level documentation of extension outcomes and impacts not previously captured in Agency wide reporting systems. Approved state plans of work and annual reports will be available in the Research, Education, and Economics Information System (REEIS) in the fall of 2008.

- **Issue 6: Program Evaluation**

Panelists were complimentary in that they saw the creation of OPA and portfolio reviews as being the first steps towards more encompassing program evaluation work; however, they emphasized the need to see outcomes and often stated that the scores they gave were partially the result of their own personal experiences rather than specific program outcomes documented in the portfolios. In other words, they know first hand that CSREES is having an impact but would like to see more systematic and comprehensive documentation of this impact in the reports.

Issue 6: Agency Response:

The effective management of programs is at the heart of the work conducted at CSREES and program evaluation is an essential component of effective management. In 2003 the PREP process and subsequent internal reviews were implemented. Over the past four years 14 portfolios have been reviewed by expert panel members and continue to be self-assessed annually. Each year this process improves, including reconfiguration of several portfolios to become better structured for planning and assessment. NPLs are now familiar with the process and the staff of the Office of Planning and Accountability (OPA) has implemented a systematic process for pulling together the material required for these reports.

Simply managing the process more effectively is not sufficient for raising the level of program evaluations being done on CSREES funded projects to the highest standard. Good program evaluation is a process that requires constant attention by all stakeholders and the agency has focused on building the skill sets of stakeholders in the area of program evaluation. The OPA has conducted training in the area of evaluation for both NPLs and for staff working at Land-Grant universities. This training is available electronically and the OPA will be working with NPLs to deliver training to those in the field.

The OPA is working more closely with individual programs to ensure successful evaluations are developed, implemented and the data analyzed. Senior leadership at CSREES has begun to embrace program evaluation and over the coming years CSREES expects to see state leaders and project directors more effectively report on the outcomes of their programs as they begin to implement more rigorous program evaluation. The new POW system ensures data needed for good program evaluation will be available in the future.

The newly formatted annual review document has encouraged the discussion of program evaluations conducted regarding programs funded by the Agency for the particular portfolio being highlighted.

- **Issue 7: Logic Models**

Panelists were consistently impressed with the logic models and the range of their potential applications. They expressed the desire to see the logic model process used by all projects funded by CSREES and hoped not only would NPLs continue to use them in their work but, also, that those conducting the research and implementing extension activities would begin to incorporate them into their work plans.

Issue 7: Agency Response:

Logic models have become a staple of the work being done at CSREES and the Agency has been proactive in promoting the use of logic models to its state partners.

Two recent initiatives highlight this. First, in 2005, the POW reporting system into which states submit descriptions of their accomplishments was completely

revamped. The new reporting system now closely matches the logic models being used in portfolio reports. Beginning in fiscal year 2007, states will be required to enter all of the following components of a standard logic model.

These components include describing the following:

- Program Situation
- Program Assumption
- Program Long Term Goals
- Program Inputs which include both monetary and staffing
- Program Output which include such things as patents
- Short Term Outcome Goals
- Medium Term Outcome Goals
- Long Term Outcome Goals
- External Factors
- Target Audience

A series of training workshops were conducted by the OPA for staff from CSREES and from the Land-Grant partnership. OPA senior staff traveled to regional conferences attended by Project Directors and Principal Investigators funded by CSREES. They conducted workshops on budget and performance integration and logic models. These sessions helped our partners understand the full picture and emphasized the need for our partners to report their accomplishments. Senior staff presented the logic model as a conceptual as well as an application tool useful for planning and reporting. Partners have now begun to use logic model in their work as well as report their accomplishments. In fact the Competitive Program unit of the Agency has made the inclusion of logic models a requirement for Integrated Programs.

Appendix B: Knowledge Areas Level Funding Tables

These funding tables provided information regarding Agency funding and non-Agency funding for all portfolio KAs. Below are definitions for Agency and non-Agency funding sources identified in the following funding tables.

- Hatch (HATCH) formula funds are allocated to the States, for the purpose of conducting agricultural research by the State Agricultural Experiment Stations. Hatch dollars are reported as expenditures in the following funding tables. *These dollars are expenditures that are reported in the Current Research Information System.*
- McIntire-Stennis (MC-STN) are funds allocated to the States, for the purpose of conducting forestry research by schools of forestry, land-grant colleges, and State Agricultural Experiment Stations. McIntire-Stennis dollars are reported as expenditures in the following funding tables. *These dollars are expenditures that are reported in the Current Research Information System.*
- Evans-Allen funds are allocated to the eligible institutions for support of agricultural research by the 1890 Colleges and Tuskegee University. *These dollars are expenditures that are reported in the Current Research Information System.*
- Animal Health and Disease Program formula funds are allocated to eligible institutions for support of livestock and poultry disease research. *These dollars are expenditures that are reported in the Current Research Information System.*
- Special Research Grants funds are awarded to eligible institutions for the purpose of conducting research to facilitate or expand food and agricultural research programs. *These are obligated dollars that are reported in the Current Research Information System.*
- National Research Initiative (NRI) Competitive Grants awarded to the eligible institutions for the purpose of conducting research emphasizing natural resources and the environment; nutrition, food quality, and health; plant systems; animal system; rural development, markets, and trade; and processing for value-added products. *These are obligated dollars that are reported in the Current Research Information System.*
- Small Business Innovation Research (SBIR) Program grants awarded to eligible institutions for the purpose of supporting high quality research proposals containing advanced concepts related to research on forests and related resources; plant production and protection; animal production and protection; air, water and soils; food science and nutrition; rural and community development; aquaculture; and industrial applications. *These are obligated dollars that are reported in the Current Research Information System.*
- OTHER CSREES funds are CSREES Administered funding programs not included in Hatch, McIntire-Stennis, Evans-Allen, Animal Health and

Disease, Special Research Grants, National Research Initiative, or Small Business Innovation Research funding programs. These include cooperative agreements, and all other agency administered research grants awarded either competitively or non-competitively. *These are obligated dollars that are reported in the Current Research Information System.*

- Smith Lever 3(d) provides the opportunity for 1862 and 1890 Land-Grant Institutions, including Tuskegee University and West Virginia State University, and the University of the District of Columbia to compete for and receive extension funds. Smith Lever 3(d) funds became competitive in 2008, prior to that it was a non-competitive extension funding source for the previously mentioned institutions. *These are obligated dollars that are reported in the Current Research Information System.*
- Smith Lever 3(b) and (c) funds provide funding for agricultural extension programs at 1862 Land-grant universities. *These dollars are expenditures that are reported in the Plan of Work Annual Report.*
- 1890 funds provide funding for agricultural extension programs at 1890 Land-grant universities. *These dollars are expenditures that are reported in the Plan of Work Annual Report*
- Other USDA funds are expenditures of funds received by the SAES and other cooperating institutions from contracts, grants, or cooperative agreements, with one of the USDA research agencies other than CSREES. *These are obligated dollars that are reported in the Current Research Information System.*
- Other Federal (FED) funds are expenditures of funds by USDA agencies, the SAES and other cooperating institutions received from federal sources, outside of USDA, through contracts, grants, and cooperative agreements directly with other federal agencies. *These are obligated dollars that are reported in the Current Research Information System.*
- State Appropriations (APPR) funds are expenditures of funds by the SAES and other cooperating institutions received from sources outside of the federal government. Direct appropriations from individual state governments. *These are obligated dollars that are reported in the Current Research Information System.*
- OTHER NON-Federal (FED) funds are expenditures of funds by USDA agencies, the SAES and other cooperating institutions received from sources outside of the federal government. Sources include the sale of products (self generated), industry grants, and miscellaneous non federal sources. *These are obligated dollars that are reported in the Current Research Information System.*

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Funding for KAs 607: Consumer Economics and 801: Individual and Family Resource Management						
Agency Funding for KAs 607 and 801						
<i>Combined Research and Extension Dollars</i>						
<i>Formula -Expenditures/Grant-Obligations in Thousands</i>						
Funding Sources	FY 2003	FY 2004	FY 2005	FY 2006	FY 2007	Total
Hatch	1,111	976	977	1,073	1,370	5,507
McIntire-Stennis	0	0	0	1	8	9
Evans Allen	129	151	90	77	147	594
Animal Health	0	0	0	0	0	0
Smith-Lever 3(b) and (c)	NA	NA	NA	NA	8,506	0
1890 Extension	NA	NA	NA	NA	2,053	0
<i>Subtotal of Formula Expenditures</i>	1,240	1,127	1,067	1,151	12,084	6,110
Special Grants	46	104	172	213	0	535
NRI Grants	675	24	1,146	619	125	2,589
SBIR Grants	0	168	296	0	69	533
Other Grants	350	10	410	433	1,690	2,893
Smith-Lever 3(d)	NA	NA	NA	NA	933	933
Rural Health & Safety Education	NA	NA	NA	NA	108	108
<i>Sub-total of Grant Obligations</i>	1,071	306	2,024	1,265	2,924	7,590
Total Agency Funding	2,311	1,433	3,091	2,416	15,008	13,700
Non-Agency Funding for KAs 607 and 801						
<i>Reported Obligations in the thousands</i>						
Other USDA	97	217	403	134	462	1,313
Other Federal	280	486	1,602	1,630	3,025	7,023
State Appr.	4,660	5,399	5,568	4,903	5,171	25,701
Other Non-Fed	1,294	1,088	1,697	1,015	1,647	6,741
Private Funding/c	NA	NA	728	667	1,216	2,611
Total Non-Agency Funding	6,331	7,190	9,998	8,349	11,521	43,389
Grand Total	8,642	8,623	13,089	10,765	26,529	57,089

NA - data isn't available

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Funding for KAs 607: Consumer Economics and 801: Individual and Family Resource Management						
Agency and Non-Agency Funding						
\$ in the thousands						
	FY 2003	FY 2004	FY 2005	FY 2006	FY 2007	Total
Sub-total CSREES Funding	2,311	1,433	3,091	2,416	15,008	24,259
Sub-total Non-CSREES Funding	6,331	7,190	9,998	8,349	11,521	43,389
Total Overall Funding	8,642	8,623	13,089	10,765	26,529	67,648

Funding for KA 608: Community Resource Planning and Development						
Agency Funding for KA 608						
<i>Combined Research and Extension Funding</i>						
<i>Formula -Expenditures/Grant-Obligations in Thousands</i>						
Funding Source	FY 2003	FY 2004	FY 2005	FY 2006	FY 2007	Total
Hatch	1,259	1,344	1,442	1,329	2,085	7,459
McIntire-Stennis	52	44	35	64	123	318
Evans Allen	30	103	95	131	263	622
Animal Health	0	0	0	0	0	0
Smith-Lever 3(b) and (c)	NA	NA	NA	NA	9,912	9,912
1890 Extension	NA	NA	NA	NA	1,312	1,312
<i>Subtotal of Formula Expenditures</i>	1,341	1,491	1,572	1,524	13,694	19,622
Special Grants	289	371	360	900	0	1,920
NRI Grants	724	331	1,637	1,472	78	4,242
SBIR Grants	75	280	157	56	186	754
Other CSREES	945	745	1,496	2,862	1,385	7,433
Smith-Lever 3(d)	NA	NA	NA	NA	718	718
<i>Subtotal of Grant Obligations</i>	2,033	1,727	3,650	5,290	2,367	15,067
Total Agency Funding	3,374	3,218	5,222	6,814	16,061	34,689
Non-Agency Funding for KA 608						
<i>Reported Obligations in the thousands</i>						
Other USDA	403	235	316	278	362	1,594
Other Federal	714	802	1,104	725	1,366	4,711
State Appr.	4,700	4,183	5,508	4,408	7,517	26,316
Other Non-Fed	1,143	1,213	2,332	1,831	2,506	9,025
Private Regional Rural Development Funding/e	NA	NA	NA	NA	1,137	1,137
Total Non-Agency Funding	6,960	6,433	9,260	7,242	12,888	42,783
Grand Total	10,334	9,651	14,482	14,056	28,949	77,472

Explanatory Table for Private Regional Rural Development Funding/e						
\$ in the thousands						
	FY 2003	FY 2004	FY 2005	FY 2006	FY 2007	Total
Western Rural Development Center	NA	NA	NA	NA	21	21
Northeast Regional Center for Rural Development	NA	NA	NA	NA	83	83
Southern Rural Development Center	NA	NA	NA	NA	544	544
North Central Regional Center for Rural Development	NA	NA	NA	NA	489	489
Total	NA	NA	NA	NA	1,137	1,137

Western Rural Development Center Funding Source ⁱ:
Utah State University

Western Rural Development Center Funding Source ⁱ:
Utah State University

Southern Rural Development Center Funding Source ⁱⁱⁱ:
Mississippi State University, Farm Foundation, Mississippi Women in Ag, National Founders Collaborative, Ohio State University Research Foundation, Kettering Foundation, eXtension: Entrepreneurs and their Communities, Delta Council, Appalachian Regional Commission, Ohio State University, REE Advisory Board, Regional Technology Strategies, University of Maine, University of Nebraska-Lincoln, Auburn University, RIDGE, Walton Foundation

North Central Regional Center for Rural Development Funding Sources ^{iv}:
Iowa State University, Nichi Meat Processor Assistance Network, Casey Foundation, Leonold Center/Winrock International

Funding for KA 608: Community Resource Planning and Development						
Agency and Non-Agency Funding						
\$ in the thousands						
	FY 2003	FY 2004	FY 2005	FY 2006	FY 2007	Total
Sub-total CSREES Funding	3,374	3,218	5,222	6,814	16,061	34,689
Sub-total Non-CSREES Funding	6,960	6,433	9,260	7,242	12,888	41,646
Total	10,334	9,651	14,482	14,056	28,949	76,335

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Funding for KA 724: Healthy Lifestyle						
Agency Funding for KA 724						
<i>Combined Research and Extension Dollars</i>						
<i>Formula -Expenditures/Grant-Obligations in Thousands</i>						
Funding Sources	FY 2003	FY 2004	FY 2005	FY 2006	FY 2007	Total
Hatch	NA	NA	0	74	317	391
McIntire-Stennis	NA	NA	0	0	0	0
Evans Allen	NA	NA	0	0	49	49
Animal Health	NA	NA	0	0	0	0
Smith-Lever 3(b) and (c)	NA	NA	NA	NA	6,827	6,827
1890 Extension	NA	NA	NA	NA	937	937
<i>Subtotal of Formula Expenditures</i>	NA	NA	0	74	8,130	8,204
Special Grants	NA	NA	0	332	0	332
NRI Grants	NA	NA	0	745	1,905	2,650
SBIR Grants	NA	NA	0	0	69	69
Other Grants	NA	NA	15	556	381	952
Smith-Lever 3(d)	NA	NA	NA	NA	784	784
Rural Health & Safety Education	NA	NA	NA	NA	651	651
<i>Subtotal of Grant Obligations</i>	NA	NA	15	1,633	3,790	5,438
Total Agency Funding	NA	NA	15	1,707	11,920	13,642
Non-Agency Funding for KA 724						
<i>Reported Obligations in the thousands</i>						
Other USDA	NA	NA	0	0	0	0
Other Federal	NA	NA	0	37	1,012	1,049
State Appr.	NA	NA	0	144	906	1,050
Other Non-Fed	NA	NA	0	4	349	353
Total Non-Agency Funding	NA	NA	0	185	2,267	2,452
Grand Total	NA	NA	15	1,892	14,187	16,094

NA - data isn't available - FY 2005 is the first year KA 724 funding was reported in CRIS

Funding for KA 724: Healthy Lifestyle						
Agency and Non-Agency Funding						
\$ in the thousands						
	FY 2003	FY 2004	FY 2005	FY 2006	FY 2007	Total
Sub-total CSREES Funding	NA	NA	15	1,707	11,920	13,642
Sub-total Non-CSREES Funding	NA	NA	0	185	2,267	2,452
Total Overall Funding	NA	NA	15	1,892	14,187	16,094

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Funding for KA 801: Individual and Family Resource Management						
Agency Funding for KA 801						
<i>Combined Research and Extension Dollars</i>						
<i>Formula -Expenditures/Grant-Obligations in Thousands</i>						
Funding Sources	FY 2003	FY 2004	FY 2005	FY 2006	FY 2007	Total
Hatch	502	437	440	460	453	2,292
McIntire-Stennis	0	0	0	1	8	9
Evans Allen	56	44	9	9	0	118
Animal Health	0	0	0	0	0	0
Smith-Lever 3(b) and (c)	NA	NA	NA	NA	7,078	7,078
1890 Extension	NA	NA	NA	NA	1,746	1,746
<i>Subtotal of Formula Expenditures</i>	558	481	449	470	9,285	11,243
Special Grants	0	0	0	0	0	0
NRI Grants	53	0	225	83	0	361
SBIR Grants	0	168	296	0	0	464
Other Grants	0	0	122	433	1,390	1,945
Smith-Lever 3(d)	NA	NA	NA	NA	919	919
Rural Health & Safety Education	NA	NA	NA	NA	108	108
<i>Sub-total of Grant Obligations</i>	53	168	643	516	2,417	3,797
Total Agency Funding	611	649	1,092	986	11,703	15,041
Non-Agency Funding for KA 801						
<i>Reported Obligations in the thousands</i>						
Other USDA	15	2	8	26	73	124
Other Federal	152	136	63	1,414	2,076	3,841
State Appr.	1,848	2,028	2,021	1,935	1,507	9,339
Other Non-Fed	936	350	241	282	307	2,116
Private Funding/c	NA	NA	728	667	1,216	2,611
Total Non-Agency Funding	2,951	2,516	3,061	4,324	5,179	18,031
Grand Total	3,562	3,165	4,153	5,310	16,882	33,072

NA - data isn't available

Funding for KA 801: Individual and Family Resource Management						
Agency and Non-Agency Funding						
\$ in the thousands						
	FY 2003	FY 2004	FY 2005	FY 2006	FY 2007	Total
Sub-total CSREES Funding	611	649	1,092	986	11,703	15,041
Sub-total Non-CSREES Funding	2,951	2,516	3,061	4,324	5,179	18,031
Total Overall Funding	3,562	3,165	4,153	5,310	16,882	33,072

Funding for KA 802: Human Development and Well Being						
Agency Funding for KA 802						
<i>Combined Research and Extension Dollars</i>						
<i>Formula -Expenditures/Grant-Obligations in Thousands</i>						
Funding Sources	FY 2003	FY 2004	FY 2005	FY 2006	FY 2007	Total
Hatch	1,205	1,061	1,104	1,416	1,133	5,919
McIntire-Stennis	0	0	0	0	0	0
Evans Allen	469	480	250	262	262	1,723
Animal Health	0	0	0	0	0	0
Smith-Lever 3(b) and (c)	NA	NA	NA	NA	15,009	15,009
1890 Extension	NA	NA	NA	NA	1,907	1,907
<i>Subtotal: Formula Expenditures</i>	1,674	1,541	1,354	1,678	18,310	24,557
Special Grants	0	0	405	386	0	791
NRI Grants	119	0	1,833	1,615	159	3,726
SBIR Grants	0	80	0	296	115	491
Other Grants	77	0	718	1,671	2,186	4,652
Smith-Lever 3(d)	NA	NA	NA	NA	2,252	2,252
Rural Health & Safety Education	NA	NA	NA	NA	162	162
<i>Subtotal: Grant Obligations</i>	196	80	2,956	3,968	4,874	12,074
Total Agency Funding	1,870	1,621	4,310	5,646	23,184	36,631
Non-Agency Funding for KA 802						
<i>Reported Obligations in the thousands</i>						
Other USDA	177	21	31	59	94	382
Other Federal	1,065	1,012	3,166	1,554	6,042	12,839
Military/d	NA	NA	NA	10,134	NA	10,134
State Appr.	6,385	6,954	8,531	6,477	9,965	38,312
Other Non-Fed	2,067	2,428	3,269	2,329	3,005	13,098
Total Non-Agency Funding	9,694	10,415	14,997	20,553	19,106	74,765
Grand Total	11,564	12,036	19,307	26,199	42,290	111,396

NA - data isn't available

Funding for KA 802: Human Development and Well Being						
Agency and Non-Agency Funding						
\$ in the thousands						
	FY 2003	FY 2004	FY 2005	FY 2006	FY 2007	Total
Sub-total CSREES Funding	1,870	1,621	4,310	5,646	23,184	36,631
Sub-total Non-CSREES Funding	9,694	10,415	14,997	20,553	19,106	74,765
Total Overall Funding	11,564	12,036	19,307	26,199	42,290	111,396

Funding for KA 803: Sociological and Technological Change Affecting Individuals, Families, and Communities						
Agency Funding for KA 803						
<i>Combined Research and Extension Dollars</i>						
<i>Formula -Expenditures/Grant-Obligations in Thousands</i>						
Funding Source	FY 2003	FY 2004	FY 2005	FY 2006	FY 2007	Total
Hatch	1,598	1,503	1,396	1,288	1,401	7,186
McIntire-Stennis	55	71	78	58	80	342
Evans Allen	396	430	334	571	670	2,401
Animal Health	0	0	0	0	0	0
Smith-Lever 3(b) and (c)	NA	NA	NA	NA	5,235	5,235
1890 Extension	NA	NA	NA	NA	971	971
<i>Subtotal: Formula Expenditures</i>	2,049	2,004	1,808	1,917	8,357	16,135
Special Grants	244	244	323	197	0	1,008
NRI Grants	1,233	1,038	1,238	672	2,162	6,343
SBIR Grants	356	422	431	0	107	1,316
Other CSREES	987	830	1,394	703	5,218	9,132
Smith-Lever 3(d)	NA	NA	NA	NA	409	409
<i>Subtotal: Grant Obligations</i>	2,820	2,534	3,386	1,572	7,896	18,208
Total Agency Funding	4,869	4,538	5,194	3,489	16,253	34,343
Non-Agency Funding for KA 803						
<i>Reported Obligations in the thousands</i>						
Other USDA	443	182	288	205	228	1,346
Other Federal	572	855	1,388	963	1,386	5,164
State Appr.	6,793	6,133	7,968	6,864	8,536	36,294
Other Non-Fed	3,122	2,526	3,566	2,414	3,514	15,142
Total Non-Agency Funding	10,930	9,696	13,210	10,446	13,664	57,946
Grand Total	15,799	14,234	18,404	13,935	29,917	92,289

NA - data isn't available

Funding for KA 803: Sociological and Technological Change Affecting Individuals, Families, and Communities						
Agency and Non-Agency Funding						
\$ in the thousands						
	FY 2003	FY 2004	FY 2005	FY 2006	FY 2007	Total
Sub-total CSREES Funding	4,869	4,538	5,194	3,489	16,253	34,343
Sub-total Non-CSREES Funding	10,930	9,696	13,210	10,446	13,664	57,946
Total Overall Funding	15,799	14,234	18,404	13,935	29,917	92,289

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Funding for KA 804: Human Environmental Issues Concerning Apparel, Textiles, and Residential and Commercial Structures						
Agency Funding for KA 804						
<i>Combined Research and Extension Dollars</i>						
<i>Formula -Expenditures/Grant-Obligations in Thousands</i>						
Funding Source	FY 2003	FY 2004	FY 2005	FY 2006	FY 2007	Total
Hatch	243	223	153	183	263	1,065
McIntire-Stennis	82	77	57	0	0	216
Evans Allen	118	107	269	439	285	1,218
Animal Health	0	0	0	0	0	0
Smith-Lever 3(b) and (c)	NA	NA	NA	NA	999	999
1890 Extension	NA	NA	NA	NA	410	410
<i>Subtotal: Formula Expenditures</i>	443	407	479	622	1,957	3,908
Special Grants	0	96	0	0	0	96
NRI Grants	61	73	0	0	5	139
SBIR Grants	0	0	0	296	0	296
Other Grants	107	96	178	98	202	681
Smith-Lever 3(d)	NA	NA	NA	NA	43	43
Rural Health & Safety Education	NA	NA	NA	NA	50	50
<i>Subtotal: Grant Obligations</i>	168	265	178	394	300	1,305
Total for Agency Funding	611	672	657	1,016	2,257	5,213
Non-Agency Funding for KA 804						
<i>Reported Obligations in the thousands</i>						
Other USDA	96	88	80	23	27	314
Other Federal	329	420	403	478	92	1,722
State Appr.	1,173	1,092	1,627	1,159	1,866	6,917
Other Non-Fed	438	638	2,540	727	2,205	6,548
Total for Non-Agency Funding	2,036	2,238	4,650	2,387	4,190	15,501
Grand Total	2,647	2,910	5,307	3,403	6,447	20,714

NA - data isn't available

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Funding for KA 804: Human Environmental Issues Concerning Apparel, Textiles, and Residential and Commercial Structures						
Agency and Non-Agency Funding						
\$ in the thousands						
	FY 2003	FY 2004	FY 2005	FY 2006	FY 2007	Total
Sub-total CSREES Funding	611	672	657	1,016	2,257	5,213
Sub-total Non-CSREES Funding	2,036	2,238	4,650	2,387	4,190	15,501
Total Overall Funding	2,647	2,910	5,307	3,403	6,447	20,714

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Funding for KA 805: Community Institutions, Health, and Social Services						
Agency Funding for KA 805						
<i>Combined Research and Extension Dollars</i>						
<i>Formula -Expenditures/Grant-Obligations in Thousands</i>						
Funding Source	FY 2003	FY 2004	FY 2005	FY 2006	FY 2007	Total
Hatch	498	459	472	452	601	2,482
McIntire-Stennis	15	23	22	20	27	107
Evans Allen	236	363	367	543	448	1,957
Animal Health	0	0	0	0	0	0
Smith-Lever 3(b) and (c)	NA	NA	NA	NA	6,189	6,189
1890 Extension	NA	NA	NA	NA	524	524
<i>Subtotal: Formula Expenditures</i>	749	845	861	1,015	7,789	11,259
Special Grants	180	405	384	441	0	1,410
NRI Grants	224	0	321	476	240	1,261
SBIR Grants	0	96	376	0	162	634
Other Grants	477	160	424	257	854	2,172
Smith-Lever 3(d)	NA	NA	NA	NA	73	73
Rural Health & Safety Education	NA	NA	NA	NA	582	582
<i>Subtotal: Grant Obligations</i>	881	661	1,505	1,174	1,911	6,132
Total Agency Funding	1,630	1,506	2,366	2,189	9,700	17,391
Non-Agency Funding for KA 805						
<i>Reported Obligations in the thousands</i>						
Other USDA	160	211	323	207	219	1,120
Other Federal	252	119	260	81	920	1,632
State Appr.	3,180	2,662	3,317	3,771	4,007	16,937
Other Non-Fed	789	754	1,139	986	1,359	5,027
Total Non-Agency Funding	4,381	3,746	5,039	5,045	6,505	24,716
Grand Total	6,011	5,252	7,405	7,234	16,205	42,107

NA - data isn't available

Funding for KA 805: Community Institutions, Health, and Social Services						
Agency and Non-Agency Funding						
\$ in the thousands						
	FY 2003	FY 2004	FY 2005	FY 2006	FY 2007	Total
Sub-total CSREES Funding	1,630	1,506	2,366	2,189	9,700	17,391
Sub-total Non-CSREES Funding	4,381	3,746	5,039	5,045	6,505	24,716
Total Overall Funding	6,011	5,252	7,405	7,234	16,205	42,107

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Funding for KA 806: Youth Development						
Agency Funding for KA 806						
<i>Combined Research and Extension Dollars</i>						
<i>Formula -Expenditures/Grant-Obligations in Thousands</i>						
Funding Source	FY 2003	FY 2004	FY 2005	FY 2006	FY 2007	Total
Hatch	NA	NA	NA	4	57	61
McIntire-Stennis	NA	NA	NA	0	0	0
Evans Allen	NA	NA	NA	0	49	49
Animal Health	NA	NA	NA	0	0	0
Smith-Lever 3(b) and (c)	NA	NA	NA	NA	40,790	40,790
1890 Extension	NA	NA	NA	NA	5,247	5,247
<i>Subtotal: Formula Expenditures</i>	NA	NA	NA	4	46,142	46,146
Special Grants	NA	NA	NA	144	0	144
NRI Grants	NA	NA	NA	66	372	438
SBIR Grants	NA	NA	NA	0	0	0
Other Grants	NA	NA	NA	380	1,777	2,157
Smith-Lever 3(d)	NA	NA	NA	NA	3,565	3,565
Children, Youth, and Families at Risk (CYFAR)	8,426	7,538	7,478	7,345	7,345	38,132
Grants for Youth Serving Institutions (RYD)	2,861	2,560	2,540	1,980	1,980	11,921
<i>Subtotal: Grant Obligations</i>	11,287	10,098	10,018	9,915	15,039	56,357
Total Agency Funding	11,287	10,098	10,018	9,919	61,181	102,503
Non-Agency Funding for KA 806						
<i>Reported Obligations in the thousands</i>						
Other USDA	NA	NA	NA	0	98	98
Other Federal	NA	NA	NA	0	765	765
Military/c	5,300	7,567	3,945	6,709	20,078	43,599
State Appr.	NA	NA	NA	16	674	690
Private Funding/d	14,573	14,170	15,104	16,414	34,911	95,172
Other Non-Fed	NA	NA	NA	3	190	193
Total Non-Agency Funding	19,873	21,737	19,049	23,142	56,716	140,517
Grand Total	31,160	31,835	29,067	33,061	117,898	243,021

NA - data isn't available

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Explanatory Table for Military Funding/c						
Supplied by National 4-H Headquarters from Military Inter-Departmental Purchase Request (MIPR) Documents						
\$ in the thousands						
	FY 2003	FY 2004	FY 2005	FY 2006	FY 2007	Total
4-H/Army	4,660	6,040	2,500	5,492	16,830	35,522
4-H/Air Force	700	1,527	1,445	1,517	2,248	7,437
4-H/Navy	NA	NA	NA	NA	1,000	1,000
Total	5,360	7,567	3,945	7,009	20,078	43,959

Explanatory Table for Private Funding/d						
\$ in the thousands						
	FY 2003	FY 2004	FY 2005	FY 2006	FY 2007	Total
National-4-H Council	14,573	14,170	15,104	16,414	18,727	78,988
State 4-H Foundations	NA	NA	NA	NA	16,184	16,184
Grand Total	14,573	14,170	15,104	16,414	34,911	95,172

Funding for KA 806: Youth Development						
Agency and Non-Agency Funding						
\$ in the thousands						
	FY 2003	FY 2004	FY 2005	FY 2006	FY 2007	Total
Sub-total Agency Funding	11,287	10,098	10,018	9,919	61,181	102,503
Sub-total Non-Agency Funding	19,873	21,737	19,049	23,142	56,716	140,517
Total Overall Funding	31,160	31,835	29,067	33,061	117,898	243,021

Appendix C - List of Supporting Programs

At-A-Glance		Summary of Programs Described in This Community Sustainability and Quality of Life Portfolio	
Name of Related Program	Description of Relationship		
Children, Youth & Families at Risk (CYFAR)	Through an annual Congressional appropriation for the National Children, Youth and Families at Risk (CYFAR) Program, the Cooperative State Research, Education, and Extension Service, under the U.S. Department of Agriculture, allocates funding to Land-Grant University Extension Services for community-based programs for at-risk children and their families. http://www.csrees.usda.gov/nea/family/cyfar/cyfar.html		
Expanded Food and Nutrition Education Program (EFNEP)	An extension program providing nutrition education to limited income families and youth across the United States and in the 6 U.S. territories. http://www.csrees.usda.gov/nea/food/efnep/formula_grant.html		
Food and Agricultural Sciences National Needs Graduate and Postgraduate Fellowship Grants Program	Grants are specifically intended to support fellowship programs that encourage outstanding students to pursue and complete their degrees or obtain postdoctoral training in areas where there is a national need for the development of scientific and professional expertise. Food science (specifically in food safety and foods for health) and human nutrition (specifically in obesity, diet and exercise) each represent one of the eight national need areas. http://www.csrees.usda.gov/nea/education/education_national_needs.html		
Hatch Evans Allen	Formula grants to 1862 and 1890 land-grant universities which support a broad array of research including integrated research related to quality of life in rural areas. http://www.csrees.usda.gov/business/awards/formula/hatch.html http://www.csrees.usda.gov/business/awards/formula/evansallen.html		

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<p>NRI Section 31.5 Human Nutrition and Obesity</p>	<p>Research and Integrated projects funded by this program are intended to lead to a better understanding of the behavioral and environmental factors that influence obesity and to the development and evaluation of effective interventions to prevent obesity. www.csrees.usda.gov/fo/humannutritionobesitynri.html</p>
<p>Rural Health and Safety Education Program</p>	<p>The primary objective of the Rural Health and Safety Education Program in 2007 and 2008 is to focus on issues related to healthy aging in rural America. It considers nutrition, healthy lifestyles, and quality of life knowledge areas. http://www.csrees.usda.gov/fo/ruralhealthandsafetyeducation.cfm</p>
<p>Smith Lever (b) & (c)</p>	<p>The Smith-Lever Act of 1914 establishes the Cooperative Extension Service and provides federal funds for cooperative extension activities. The act requires that states provide a 100% match from non-federal resources. The act also authorizes special extension projects under section 3(d). Current projects funded under this authority include the Expanded Food and Nutrition Education Program, Farm Safety, Integrated Pest Management, and Children, Youth and Families at Risk. http://www.csrees.usda.gov/business/awards/formula/smithlever.html</p>
<p>Agriculture and Food Research Initiative (AFRI)</p>	<p>The Agriculture and Food Research Initiative (AFRI) Rural Development (formally the National Research Initiative (NRI) Rural Development) funding focuses on the creation of new knowledge and implementation of practical strategies for the development of sustainable rural communities focusing on reducing poverty; protecting the environment and enhancing community economic vitality. http://www.csrees.usda.gov/funding/afri/afri.html</p>
<p>Rural Youth Development (RYD)</p>	<p>Rural Youth Development (RYD) provides programs for youth in rural areas. The emphasis is on building leadership and personal skills in youth who can then improve their own lives and the communities in which they live.</p>
<p>Small Business Innovation Research (SBIR)</p>	<p>Small Business Innovation Research (SBIR) Rural Development focus is on the development of new technology or for the utilization of existing technology to address important economic and social development issues or problems in rural America http://www.csrees.usda.gov/fo/sbir.cfm</p>

Appendix D - Partnering Agencies and Other Organizations

Portfolio: Community Sustainability and Quality of Life Partnering Agencies and Organizations	
Name of Program	Agency Type
Rural Housing Service	USDA Agency
Food and Drug Administration Office of Women's Health	Non-USDA Federal Agencies
Health and Human Services Steps to a Healthier US	Non-USDA Federal Agencies
Centers for Disease Control/National Cancer Institute Breast Cancer Prevention and Outreach (Team Up)	Non-USDA Federal Agencies
America On The Move Foundation	Non-USDA Agency
Federal Interagency Working Group on Child Abuse and Neglect Prevention-Recognizing	Non-USDA Federal Agencies
Federal Interagency Working Group on Older American Indians	Non-USDA Federal Agencies
Financial Literacy and Education Commission	Non-USDA Federal Agencies
United States Department of Housing and Urban Development - Office of Lead Hazards Control and Healthy Housing	Non-USDA Federal Agencies
Helping America's Youth	Non-USDA Federal Agencies
Department of Home Security - Federal Emergency Management Agency	Non-USDA Federal Agencies
President's New Freedom Initiative on Mental Health	Non-USDA Federal Agencies
National Savings Forum	Non-Federal Organization
Jump\$tart Coalition for Personal Financial Literacy,	Non Federal Organization
American Savings Education Council	Non Federal Organization

Appendix E - Program Evaluations

Portfolio (Portfolio Name)'s Program Evaluations				
Date	Type of Evaluation/Analyses	Brief Description	Evaluation Recommendations	What Was the Effect
2007, 2008	Reports by County Extension educators.	Participation in America Saves Week – direct method types and people reached; indirect method types and people reached; Savers enrolled, monthly savings pledged, accounts opened; partners; funding and other sponsorship	Coordinate with Consumer Federation of America to avoid duplication in reporting Quantify public value of Extension involvement to encourage community members to build wealth, not debt	Financial institutions offering low deposit accounts for first-time savers Participants changing knowledge and actions related to debt management and savings
Ongoing	Program participant self-report	Financial Security in Later Life toolkit of educational programs	Maintain community-based programming as determined by local needs analysis; transition programs for web-based learning through eXtension	Educators trained; program participants gained knowledge and took action
2004, 2009	Mailed survey; focus groups	NEFE® High School Financial Planning Program (CSREES, working through Cooperative Extension) is a leading partner	Include components on effectiveness of teacher training. Articulate public value along with knowledge, action, and confidence changes by participants	Teachers trained; student knowledge improved; students actions changed positively; students confidence with money increased
2008	On-line	eXtension Financial Security assessments	Go beyond outputs data about page views and length of visits to determine knowledge and planned action changes	Knowledge gained; positive financial actions planned

Appendix F - List of Stakeholder Groups Consulted

List of Stakeholder Groups Consulted in 2008
KA 607 & 801
Consumer Economics and Individual and Family Resource Management
AARP Foundation
America Savings Forum
American Council on Consumer Interests
American Savings Education Council
American Savings Education Council Government Interagency Group
Association for Financial Counseling and Planning Education
Consumer Federation of America
Extension Committee on Policy and Operations, NASULGC
eXtension Foundation
Financial Literacy and Education Commission (includes 20 federal agencies)
Financial Literacy Group
FINRA Investor Education Foundation
Investment Company Institute Education Foundation
Jump\$tart Coalition for Personal Financial Literacy
KA 608
Community Resource Planning and Development
<u>Association of 1890 Research Directors</u>
Association of Extension Administrators
Association of Research Directors
Association of Southern Region Extension Directors
Economic Research Service
National Agricultural Research, Extension, Education, and Economics Advisory Board (NAREEEB)
National Association of Counties
National e-Commerce Extension Initiative National Advisory Committee
National Endowment for Financial Education
National eXtension Entrepreneurs and Their Communities Team
New America Foundation
North Central Community and Economic Development Program Leaders
North Central Cooperation Extension Association
North Central Regional Association of Agricultural Experiment Station Directors
North Central Regional Center for Rural Development Board of Directors
<u>North East Extension Directors</u>
Northeast Regional Center for Rural Development Board of Directors
Northeastern Regional Association of State Agricultural Experiment Station Directors
President's Advisory Council on Financial Literacy
Society for Financial Education and Professional Development
Southern Association of Agricultural Experiment Station Directors
Southern Region Community Development Program Leaders
Southern Rural Development Center Board of Directors
Southern Rural Development Center's Technical Operations and Advisory Committee results
Western Association of Agricultural Experiment Station Directors
Western Extension Directors Association
Western Rural Development Center Board of Directors
KA 724 and KA 805
Healthy Lifestyle and Community Institutions, Health, and Social Services
4- H Healthy Living Taskforce
Colorado State University Leadership Team (Liaison State)

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CSREES Nutrition and Health Committee for Planning and Guidance
eXtension Cargiving CoP
Federal Interagency Task Force on Older American Indians
Team Up Collaborative for Cancer Screening
University of Minnesota Leadership Team (Liaison State)
KA 802
Human Development and Well-Being
American Society On Aging/National Council On Aging Annual Session
Brookdale Foundation Relative As Parents Program
Coalition Of Organizations On Disaster Education (Code)
Conference & Family And Consumer Sciences Administrators Annual Meeting
Cornell University Military Family Programs
CSREES/AARP Foundation Caregiver
Extension Communities Of Practice
Family Strengthening Awards Committee
Federal Interagency Task Force On Older American Indians
Federal Interagency Working Group On Child Abuse And Neglect
Generations United Program Committee
Gerontological Society Of America Annual Scientific Meeting
Medicare Partners Coordinating Committee
Multistate Research Projects
National Assembly Family Strengthening Peer Network
National Caregiver Advisory Committee
National Council On Family Relations Annual Conference
National Extension Association Of Family And Consumer Sciences
National Extension Relationship And Marriage Education Network
National Fatherhood Initiative
Obesity Task Force
President's New Freedom Initiative On Mental Health
Public Issues Leadership Development Meeting
Team-Up: Cancer Prevention Saves Lives Project
Texas Agrilife Extension Military Family Programs
University Of Maryland Military Family Programs
KA 803
Sociological and Technological Change Affecting Individuals, Families and Communities
Consortium of State Agriculture in the Classroom Programs
National 4-H GIS/GPS Leadership Team
National 4-H Science, Engineering and Technology Task Force
KA 804
Human Environmental Issues Concerning Apparel, Textiles, and Residential and Commercial Structures
Housing Education and Research Association
Federal Partners in Housing
Federal Healthy Homes Agencies
eXtension Home Energy Community of Practice
National Home Safety Council
Electrical Safety Foundation International
Association of Home Equipment Educators
KA 806
Youth Development
Children, Youth and Families at Risk (CYFAR) Project Directors
Children, Youth, and Families at Risk (CYFAR) listening sessions for funding restructuring
Executive Oversight Committee for Afterschool.gov

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National 4-H Afterschool Association
National 4-H Citizenship Task Force
National 4-H Conference
National 4-H Congress
National 4-H Council Board of Trustees
National 4-H Curriculum Working Group
National 4-H Healthy Living Task Force
National Association of Elementary School Principals
National Association of Extension 4-H Agents Board of Trustees
Rural Youth Development Grant recipients
Special Extension Director Task Force on 4-H Issues
University Contacts for Afterschool Programs

Appendix G - Documentation of Previous Score Changes

2008 Rational for Score Change

Integration-from a score of 2.5 to 2. *Justification:* Discussion among NPLs and program specialists responsible for this portfolio revealed ambiguity in the interpretation of the integration criterion. Where some NPLs viewed integration from a programmatic perspective, others viewed it as purely functional. Additionally, NPLs felt that from a functional perspective, the portfolio was not highly integrated. Following the scoring discussion, NPLs decided to lower the integration score, because they determined that based on the true definition of integration, a score of 2 was more appropriate at this time.

Multi-Disciplinary Balance-from a score of 3 to 2.5. *Justification:* NPLs responsible for this portfolio lowered this score from 3 to 2.5 because although they believed there are a variety of disciplines represented, balance was at issue. Much of the work of this portfolio is siloed due to human resource and funding challenges. While there is great opportunity for multi-disciplinary balance in this portfolio, the current NPL and program specialist workload does not provide an environment conducive to good balance.

Significance-from a score of 2 to 2.5. *Justification:* This score was raised because there is greater access to and use of quality outputs and outcomes provided by the Office of Planning and Accountability.

Methodology-from a score of 2 to 2.5. *Justification:* This score was raised due to the use of virtual panels, the implementation of RSS feeds, and the use of web-based technologies by NPLs and program specialists, such as Breeze. NPLs responsible for this portfolio felt that they and the agency are moving in the right direction in the implementation of current and cutting edge technologies to support funded projects.

Productivity-from a score of 2 to 2.5. *Justification:* The system is designed for stakeholder input, and partnerships with stakeholders in supporting the work of this portfolio are highly evident throughout this report. The score was raised from 2 to 2.5 because there is greater documentation of productivity through collaborative efforts in this report. See the section entitled “What others are Doing” and Appendix E “Partnering Agencies and Other Organizations” of this report for additional information on productivity through collaborative partnerships.

Timeliness-from a score of 2.5 to 3. *Justification:* Formula and external funding in this portfolio requires that projects be completed in the timeframe of funding. This score was raised from 2.5 to 3, because NPLs felt that all funded projects managed through this portfolio are completed on time, granted limited no-cost extensions, or are in the sustainability phase beyond the funding cycle and function without additional funding.

Agency Guidance-from a score of 2 to 2.5. *Justification:* Through exemplary leadership by the Office of Planning and Accountability and their management and support of this portfolio, steady improvements have been made. Through OPA efforts, stakeholders

know and interact with CSREES staff through enhanced communications and outreach. Additionally, the highly successful NPL Liaison Program has built trust and open dialogue throughout the system. Therefore, NPLs raised this score from 2 to 2.5 to reflect the progress made on this criterion.

2007 Rational for Score Change:

Focus-from a score of 2 to 2.5. *Justification:* In assessing this criterion, the self-score review team documented high priority areas where progress has been made since the panel review. Additionally, a redistribution of Knowledge Areas and a strategic planning process has been implemented to better guide this portfolio.

Integration-from a score of 2 to 2.5.

Justification: In assessing this criterion, the self-score review team felt that the breadth of the portfolio reflected the breadth of work in the system and recognized the need to redistribute Knowledge Areas in a more logical and focused way. Redistribution occurred following panel recommendations with the resulting Quality of Life in Rural Areas portfolio more strategically integrated around issues related to quality of life in rural areas.

Quality of Life in Rural Areas Comprehensiveness-from a score of 2 to 2.5.

Justification: In assessing this criterion, the self-score review team was aware of the panel's observation that the portfolio was moderately comprehensive-quite broad yet not deep. Again, this is to some extent a result of the array of KAs that were included in the 2.2 portfolio. With redistribution of KAs, the self-score review team believes that portfolio Quality of Life in Rural Areas will be much more reflective of the suggestion that the portfolio should focus on doing a few things well rather than many things satisfactorily.

Additionally, the review team documented multiple activities highlighting a more targeted strategic plan for the portfolio in the future.

Timeliness-from a score of 2 to 2.5.

Justification: In assessing this criterion, the self-score review team discussed critical processes and partnerships in place around special projects which "must be completed on time" while also acknowledging the fact that some projects, such as Hatch may require no cost extensions. Following dialogue about timeliness issues around projects and funding, the self-score team believed that the panel did not have an accurate operational definition of "timeliness" and the Planning and Accountability Office agreed to explore this issue at the agency level.

Appendix H - Levels of Evidence

1=Gold
All are evidence-based

Levels of Research Evidence
Adapted From Priorities for Selecting an Intervention Program-National Cancer Institute, 2005

T Y P E S	TYPES OF PROGRAMS				
		Research Tested Intervention Program (peer reviewed, funded research & publication)	Evaluated Program (peer reviewed publication)	Evidence- Informed Program (based on literature)	Program based on experience/tacit knowledge (no reference to literature)
O F	Systematic Review	1	2	4	NA
E V I D	Secondary Systematic Review	2	3	6	NA
E N C	Individual Efficacy/ Effectiveness Study	4	5	7	NA
E	Individual Program Evaluation	NA	NA	8	9