

EFNEP FGO CHECKLIST (FOR YEARS WITH ONLY ONE FGO)

EFNEP SPECIFIC REPORTING REQUIREMENTS

Program plans and budgets should focus on effectively reaching and meeting the needs of the Expanded Food and Nutrition Education Program's (EFNEP) target audience. Use this checklist to avoid some of the common errors we encounter during the Formula Grant Opportunity (FGO) review. **You should have "YES" selected for each item unless otherwise indicated.**

5-YEAR PLAN/ANNUAL UPDATE¹

FOR BOTH 5-YEAR PLAN AND ANNUAL UPDATE YEARS:

- | | | |
|---|------------------------------|-----------------------------|
| 1. Did you use the 5-Year Plan Template ? | YES <input type="checkbox"/> | NO <input type="checkbox"/> |
| 2. Did you follow the instructions for completing a 5-Year Plan/Annual Update? | YES <input type="checkbox"/> | NO <input type="checkbox"/> |
| 3. Did you save the 5-Year Plan/Annual Update as a PDF document? Note, Annual Update should include the updated 5-Year Plan template and the Annual Update Cover Sheet. | YES <input type="checkbox"/> | NO <input type="checkbox"/> |

FOR 5-YEAR PLAN YEARS:

- | | | |
|---|------------------------------|-----------------------------|
| 4. Did you enter information into every required section? | YES <input type="checkbox"/> | NO <input type="checkbox"/> |
| 5. Did you have the 5-Year Plan signed by your Extension Director or Administrator? | YES <input type="checkbox"/> | NO <input type="checkbox"/> |

FOR ANNUAL UPDATE YEARS:

- | | | |
|---|------------------------------|-----------------------------|
| 6. Did you review the information you submitted last year? | YES <input type="checkbox"/> | NO <input type="checkbox"/> |
| 7. Did you make changes and updates as needed directly into your 5-Year Plan? | YES <input type="checkbox"/> | NO <input type="checkbox"/> |
| a. Did you update the Program Priority tables with actual values for the fiscal year? | YES <input type="checkbox"/> | NO <input type="checkbox"/> |
| b. Did you update the Delivery Sites/Locations chart? | YES <input type="checkbox"/> | NO <input type="checkbox"/> |
| c. Did you enter new qualitative program impacts? (optional) | YES <input type="checkbox"/> | NO <input type="checkbox"/> |
| 8. Did you document changes in the Annual Update Cover Sheet? | YES <input type="checkbox"/> | NO <input type="checkbox"/> |

¹ For more information about the 5-Year Plan vs. the Annual Update review the [5-Year Plan/Annual Update Training Presentation](#).

BUDGET SHEET

FOR BOTH 5-YEAR PLAN AND ANNUAL UPDATE YEARS:

- | | | |
|--|------------------------------|-----------------------------|
| 1. Did you use the EFNEP Budget Sheet (excel) ? | YES <input type="checkbox"/> | NO <input type="checkbox"/> |
| 2. Did you follow the instructions for completing the Budget Sheet? | YES <input type="checkbox"/> | NO <input type="checkbox"/> |
| 3. Did you enter the correct allocation amount? (see FGO Instructions, Appendix A) | YES <input type="checkbox"/> | NO <input type="checkbox"/> |
| 4. Did you enter the correct fiscal year? | YES <input type="checkbox"/> | NO <input type="checkbox"/> |
| 5. Did you include carry-over funds? | YES <input type="checkbox"/> | NO <input type="checkbox"/> |
| 6. Did you allocate at least 60% of your total funds to Paraprofessionals and their support costs? (see EFNEP Program Policy Document) | YES <input type="checkbox"/> | NO <input type="checkbox"/> |
| 7. Does your "Total Amount" equal your "Total Funds Available"? | YES <input type="checkbox"/> | NO <input type="checkbox"/> |
| 8. Did you enter equipment costs correctly? (see Budget Justification Instructions)
a. Single items costing \$5000 or more should be listed under "Equipment"
b. All others should be listed under "Other Expenses" | YES <input type="checkbox"/> | NO <input type="checkbox"/> |
| 9. Did you make sure the amounts entered in your Budget Sheet match the amounts listed in your Budget Justification? | YES <input type="checkbox"/> | NO <input type="checkbox"/> |
| 10. Did you have the Budget Sheet signed by your Extension Director or Administrator? | YES <input type="checkbox"/> | NO <input type="checkbox"/> |
| 11. Did you save the Budget Sheet as a PDF document? | YES <input type="checkbox"/> | NO <input type="checkbox"/> |

BUDGET JUSTIFICATION

FOR BOTH 5-YEAR PLAN AND ANNUAL UPDATE YEARS:

- | | | |
|---|------------------------------|-----------------------------|
| 1. Did you follow the instructions for completing the Budget Justification? | YES <input type="checkbox"/> | NO <input type="checkbox"/> |
| 2. Did you make sure the amounts listed in your Budget Justification match the amounts entered in your Budget Sheet? | YES <input type="checkbox"/> | NO <input type="checkbox"/> |
| 3. Did you provide a brief explanation of each of the items in your budget sheet including sufficient justification for any large or unusual expenses? | YES <input type="checkbox"/> | NO <input type="checkbox"/> |
| 4. If you have a large amount of carryover, did you explain how you intend to spend it down? | YES <input type="checkbox"/> | NO <input type="checkbox"/> |
| 5. Did you report equipment costs correctly? (see Budget Justification Instructions)
a. Single items costing \$5000 or more should be listed under "Equipment"
b. All others should be listed under "Other Expenses" | YES <input type="checkbox"/> | NO <input type="checkbox"/> |

6. Did you avoid using EFNEP funds for unallowable expenses ?	YES <input type="checkbox"/> NO <input type="checkbox"/>
a. Did you avoid using EFNEP funds for marketing materials ² ?	YES <input type="checkbox"/> NO <input type="checkbox"/>
b. Did you avoid using EFNEP funds for furniture costs?	YES <input type="checkbox"/> NO <input type="checkbox"/>
7. For any items on the budget which are shared, did you allocate EFNEP funds only in proportion to the amount they will be used in support of EFNEP?	YES <input type="checkbox"/> NO <input type="checkbox"/>
8. Did you save the Budget Justification as a PDF document?	YES <input type="checkbox"/> NO <input type="checkbox"/>

AFTER YOU COMPLETE THIS CHECKLIST, YOU SHOULD PROVIDE THE PDFS OF THE 5-YEAR PLAN/ANNUAL UPDATE, BUDGET SHEET AND BUDGET JUSTIFICATION TO WHOEVER SUBMITS YOUR INSTITUTION’S FGOS. THE DOCUMENTS NEED TO BE SAVED AS ONE PDF FILE. (FOR INSTRUCTIONS SEE - [HTTP://WWW.NIFA.USDA.GOV/NEA/FOOD/EFNEP/QUESTIONS.HTML#ATTACH](http://www.nifa.usda.gov/nea/food/efnep/questions.html#attach) FOR)

THE PDF SHOULD BE ATTACHED TO THE “SUPPLEMENTAL FORM” UNDER #8, THE “CONFLICT OF INTEREST LIST”. PLEASE DISREGARD THE FACT THAT IT SAYS “CONFLICT OF INTEREST LIST”. TO ATTACH THE PDF TO THE FORM, CLICK ON “ADD ATTACHMENT,” AND FOLLOW THE INSTRUCTIONS.

² *Marketing materials, in general, are not considered allowable expenses; educational materials used to introduce potential participants and partners to the program are.*