Frequently Asked Questions (FAQs) for the new Plan of Work (Institutional

General

Why is NIFA changing the Plan of Work?

The goal of the POW/REEport Integration project is to better help "tell the story" of how the Land-Grant university (LGU) partners and National Institute of Food and Agriculture (NIFA) are working together to advance agricultural research and extension across the nation. NIFA is doing this by implementing the Plan of Work (POW) Panel of Experts recommendation to consolidate the POW system into REEport. NIFA continues to work with LGU partners to find innovative solutions for meeting the legislative requirements of [Agricultural Research, Education, and Extension Reform Act (AREERA)](#), improve data quality, and lessen reporting burden.

What is the Plan of Work and what does AREERA require LGUs to report?

AREERA requires that states submit a POW, including yearly accomplishments and results, to receive federal funding. AREERA, the Smith-Lever Act, the Hatch Act, and the National Agricultural Research, Extension, and Teaching Policy Act of 1977 are the funding authorities for Extension and Research activities at the Land-Grant universities.

The Plan of Work includes the following elements:

- Executive Summary
- Merit/Peer Review
- Stakeholder Input
- Critical Issues
- Multistate & Integrated Financials

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

Who served on the 2015 Plan of Work Panel of Experts, and what did they recommend?

The POW Panel of Experts convened on June 16-18, 2015, and was composed of representatives from LGUs and NIFA. The Panel identified streamlining the reporting process to reduce the burden of reporting, improving the quality of data as priorities for the new system, and consolidating POW into REEport as one system.

The recommendations were vetted by the LGU panel members with the Research and Extension Directors and Deans in their regions and by NIFA NPLs with their institutes.

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The final recommendations were presented to NIFA's Director, Dr. Sonny Ramaswamy, on September 27, 2015.

What has changed with the Plan of Work?

The primary change in the system redesign is the replacement of Planned Programs with state-defined Critical Issues, which are explained in greater detail in the following FAQs.

Prior to the 2020 Plan of Work, the POW reporting consisted of two core documents: the Plan of Work and the Annual Report of Accomplishments and Results. A set of multistate and integrated financial forms supplemented the two core documents along with research project reporting. In the system redesign, these documents remain and are collectively referred to as the Institutional Profile. The bulk of the reporting required in these documents is mandated by AREERA legislation and other funding authorities. The core elements will remain largely unaltered in both form and function through the redesign process. The portions of the Institutional Profile that will remain static include:

- Executive Summary
- Merit/Peer Review
- Stakeholder Input
- Multistate & Integrated Financials

What is the Institutional Profile?

The Institutional Profile is the name for the new, consolidated Plan of Work system. It is a new section of REEport for collecting the information needed to meet AREERA requirements,

What features were in the first release of the new Institutional Profile?

The new Institutional Profile was released on October 19, 2018 and delivered on NIFA's commitment to consolidate the former POW into REEport. New features included a dashboard to manage AREERA reporting; streamlined reporting requirements; reduced data entry; and state-defined critical issues that organize and help "tell the story" of how NIFA is working together to advance agricultural research and extension across the nation.

What are some of the benefits of the new Institutional Profile?

Benefits of the new Institutional Profile include:

- The number of POW form fields decreased from 24 to 10, thus, reducing the reporting burden for states and reviewers
- A streamlined dashboard helps to manage work flow

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- Critical Issues replace Planned Programs allowing states to define their top priorities
- REEport Site Administrators directly manage roles in the new POW instead of going through NIFA
- Information collection integrates with REEport and will further streamline reporting in future updates

What changes occurred in the second release?

A new application icon was added to the NIFA Reporting Portal for the Institutional Profile, which provides access to the new dashboard and Plan of Work. The NIFA Science Emphasis Areas (SEAs) were added as an attribute of the new state-defined critical issues to organize and correlate state-defined issues with NIFA's science priorities.

Site Administrators also gained the ability to manage Institutional Profile roles in addition to the REEport roles they already managed. NIFA recommends that primary contacts in the former POW system have conversations with their leadership to determine the approach that works best since the Site Administrator role will be new to some. In the past, role management in the POW system was handled by primary contacts who routinely worked with NIFA to request changes to roles in the POW.

Please email pow@usda.gov for Site Administrator information for your institution. NIFA will work closely with LGU partners in the development of the second phase.

What does the third release, scheduled for November 26, 2019, bring in terms of changes?

The most significant change will retire Planned Programs from the REEport research project initiation process for AREERA programs and, instead, link research projects to Critical Issues. Critical issues are a requirement of AREERA and were implemented in the Institutional Profile. This change affects Hatch, Hatch Multistate and Evans-Allen programs. Research projects initiated after this change will be prompted to add a Critical Issue to the project initiation report. NIFA will initiate a similar change for Extension programs after the Extension Partner Working group has completed its work in 2020. These changes will help to streamline reporting and reduce the burden of data collection for the POW Annual Report of Accomplishments and Results.

There are multiple improvements affecting the Institutional Profile. Highlights include:

- LGU Deans and Directors will be able to call back (unsubmit) their Plan of Work during the submission process through the Director's log under the Submit Status icon. This enables the POW to be unlocked for further editing and resolves the occasional instance when a submission gets "hung up" while moving the information into the NIFA review stage due to changes in the Institutional Profile roles during the workflow process.

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- The 2021 Plan of Work will roll over automatically and be visible in the dashboard. The data from the FY 2020 Plan will be carried forward.
- The dashboard will include contact information for the NIFA Liaison.
- New email notifications are being added throughout the POW process.

For Land-Grant Universities (LGU)

What can REEport Site Administrators do regarding Institutional Profile roles?

REEport Site Administrators are able to directly manage Institutional Profile roles for their LGU. Site Administrators and other LGU staff who help manage POW and REEport roles should review the "Managing User Roles for Institutional Profile Guide." Guides can be requested from the Plan of Work (POW) and REEport Integration: Institutional Profile User Guides page on NIFA's website. LGU leadership are encouraged to discuss the new responsibilities of the Site Administrator role and determine who is best suited to help manage roles and access to the Institutional Profile system. For general information on navigating the new Plan of Work, review the "NIFA Institutional Profile User Guide" available, by request, from the Plan of Work (POW) and REEport Integration: Institutional Profile User Guides web page. Institutions should continue to update the status and profile of all current POW users, identify new users to be added, and make requests for non-active users to be removed from POW to ensure role management is maintained for the 2019 Annual Report of Accomplishments and Results reporting cycle.

What are Science Emphasis Areas?

There are nine NIFA Science Emphasis Areas (SEAs) that capture all research and extension activities according to NIFA's science strategic goals and objectives. Users will need to associate at least one SEA for each critical issue in the Plan of Work. These associations will help inform reporting related to research project initiations and, eventually, extension program initiations in REEport. Specifically, the Critical Issue and SEA association will link research projects and extension programs in REEport to the Plan of Work in the Institutional Profile.

What if the SEA I picked with my Primary Critical Issue does not align with the Knowledge Area I choose for my research project initiation?

The POW requires an initial association of Science Emphasis Areas (SEAs) to critical issues that NIFA, in turn, maps to Knowledge Areas (KAs). If these do not align, the system will not require changes at this point. NIFA will examine instances where Critical Issues, KAs, and SEAs do not align and determine next steps.

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What is the timeline for upcoming phases of the consolidation?

The first release was completed on October 19, 2018 for the new dashboard and the Plan of Work. In the next release, on November 26, 2019, REEport will require new research project initiations to be associated with a critical issue. Currently active projects may be associated with a critical issue via the project change process. Extension programs initiations will also require critical issue associations once those initiations are implemented in the REEport system in 2020. An Extension Working Group is being formed and will be working to identify and finalize requirements for Extension program initiation and accomplishment reporting.

What is the reporting due date for the 2020 POW and what other reports will be required in Institutional Profile?

All reporting due dates for Plan of Work reporting remain the same except for the 2020 Plan of Work submission due date which was moved to June 1, 2019. All FY 2020 POW-related reporting will be completed in the new Institutional Profile. The Plan of Work will be the first of three FY 2020 reports to be released. The remaining two reports, Annual Report of Accomplishments and Results and OGFM Supplement Form, will be released to ensure timely report submission in subsequent fiscal years.

What is happening to the old POW?

FY 2018 and FY 2019 activities will be completed in the current POW application (i.e., Annual Reports and OGFM Supplemental forms). After those activities and subsequent reviews are completed, NIFA will take the current POW system offline. NIFA will also evaluate options for the archiving of past reports and ongoing storage within the REEIS site.

How do I gain access to the Institutional Profile?

When the Institutional Profile was implemented in October 2018, current POW users were granted the same access to the new Institutional Profile and the 2020 Plan of Work as they had in the POW system. New users can be given access by a REEport Site Administrator associated with their institution. NIFA will continue to provide assistance to users with the current POW for any complex changes needed. Please contact pow@usda.gov for questions regarding the Institutional Profile and the current POW reporting systems.

Why do I have the Institutional Profile button? I don't work on POW.

All site administrators were given a new Institutional Profile button by default so that they can manage Institutional Profile roles, if needed. NIFA encourages REEport site administrators to discuss the new approach to managing access and roles in the Institutional Profile with LGU leadership to determine who is in the best position to assume this responsibility in the future. Visit the resource page for Plan of Work (POW)

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and REEport Integration: Institutional Profile User Guides to learn more about how to manage users for Institutional Profile.

Who will manage roles for the new Institutional Profile and what are the steps to perform that function?

Initially, existing REEport Site Administrators were assigned the responsibility for managing roles for the new Institutional Profile. NIFA encourages REEport Site Administrators to discuss the new approach to managing Institutional Profile roles with LGU leadership at their institution to determine the most appropriate individual to assume the responsibility. NIFA recommends that all Site Administrators be given the added permission to manage Institutional Profile roles; however, it may be desirable to limit that to a select number of Site Administrators. Additional information on Institutional Profile role management is available, upon request, from the Plan of Work (POW) and REEport Integration: Institutional Profile User Guides resource page.

Site Administrators can edit information for existing users or add new users using the current procedures by going to the Administration section, choosing the REEport site, and completing the following steps:

1. Click the Add User or choose an existing user to edit.
    1. Complete the required fields for new users.
    2. Scroll to the section with application, state, institution, and role selections.
2. Select the appropriate institutional site.
3. Choose the Institutional Profile User role from the dropdown.
4. Click Save.
5. Click the Manage Institutional Profile Roles link (appears below the Search feature in the upper right).
6. Find the user.
7. Check the appropriate role(s).
8. Click Update Roles.
9. Click Return to Portal Administration.

For issues or more complex changes, please contact NIFA at pow@usda.gov.

Now that the Institutional Profile is up and running, when will I be required to use the original POW system versus the new system for each report?

Institutions will complete their Plans in the new Institutional Profile system for FY 2020 and all subsequent years. The 2019 Annual Reports, the Annual Report of Accomplishments and Results and Office of Grants and Financial Management (OGFM) Supplemental forms (Multistate & Integrated financials including brief summaries), will be completed in the original POW system. The first annual report submissions for the 2020 Plan of Work will not be due until 2021. At that time, institutions will be submitting reports using the Institutional Profile system.

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AREERA Requirement	2019	2020	2021
Plan of Work	Waived	Institutional Profile *Due: June 1, 2019*	Institutional Profile *Due: May 1, 2020*
Annual Report	Current format *Due: May 1, 2020*	Institutional Profile *Due: April 1, 2021*	Institutional Profile *Due: April 1, 2022*
OGFM Supplemental forms (Brief Summaries, Multistate & Integrated financials)	Current format *Due: May 1, 2020*	Institutional Profile *Due: April 1, 2021*	Institutional Profile *Due: April 1, 2022*

Will any of my existing data be migrated into the new system?

In the first year of the new Plan of Work system for the FY 2020 Plan, text was entered for the first time by the institutions. After FY 2020, text for all sections and fields will be carried over or pre-populated to next year's Plan and may be subsequently revised by institutions. The obvious exception to the pre-populated text is that the five-year full-time equivalent (FTE) estimates will adjust and gain the new fifth year while dropping the current year (e.g., 2021 will require entry of 2025 estimates and allow editing of years 2021-2024. 2020 will be removed from view).

What are Critical Issues?

Critical Issues replaced Planned Programs in the Plan of Work. They are the critical short-, intermediate-, and long-term agricultural issues within the state. AREERA requires that states describe them in their Plans of Work.

Specifically, each Plan of Work for a state required under AREERA subsection (d) shall contain descriptions of the following:

1. The critical agricultural issues in the state in which the eligible institution is located and the current and planned extension programs and projects targeted to address the issues.
2. The process established to consult with extension users regarding the identification of critical agricultural issues in the state and the development of extension programs and projects targeted to address the issues.

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3. The efforts made to identify and collaborate with other colleges and universities within the state, and within other states, that have a unique capacity to address the identified agricultural issues in the state and the extent of current and emerging efforts (including regional extension efforts) to work with those other institutions.

4. The manner in which research and extension, including research and extension activities funded other than through formula funds, will cooperate to address the critical issues in the state, including the activities to be carried out separately, the activities to be carried out sequentially, and the activities to be carried out jointly.

5. The education and outreach programs already underway to convey currently available research results that are pertinent to a critical agriculture issue, including efforts to encourage multicounty cooperation in the dissemination of research results.

How many Critical Issues should a state list?

States may identify as many or as few as they think appropriate. NIFA recommends no more than 5-7 but will continue to gather feedback on what states feel makes sense for them.

Do I have to close and re-initiate my project to associate a critical issue?

No, you do not have to close and re-initiate your project. Just as with Planned Programs, you may alter the Classification section of your project by going to the Track Changes tab in REEport, pull up your project, and click on the Classification tab. Next, you will see the Primary Critical Issue drop down. Choose one and click Save. While neither the Planned Program nor the Critical Issue will be logged as a change to the project log and will, therefore, not require approval, it will become a permanent association to your project data. NIFA is working on a reporting feature to more easily see the alignments of projects to Critical Issues.

What if my project aligns with more than one critical issue?

NIFA is cognizant that large projects may touch more than one critical issue. At this time, NIFA is asking people to select the primary critical issue. As with any evolving data collection process, NIFA expects to learn and refine the approach, especially through NIFA's working groups for extension and classification.

What if I want to call back (unsubmit) my Plan of Work?

If there are other Directors in your chain for approval and the status is "Submission in Progress," click on the Submit Status icon and choose unsubmit. If the POW has already been submitted to NIFA (in NIFA Review), then please contact your NIFA

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Liaison to assist you. Your liaison's contact information appears under the POW Review column.

What if our Site Administrator did not update the roles for our departing Director who still shows up under the submit status log as "not submitted?"

Site Administrators should first remove the Institutional Profile role then deactivate the user in Portal. Next, navigate to the new Institutional Profile dashboard, click on the Submit Status icon, and choose one of the Directors to unsubmit, and then ask that Director to resubmit the Plan.

What is happening to Planned Programs?

The section for Planned Programs was replaced by a section called Critical Issues in the 2020 POW. One driver for this change is the Planned Program data collection overlapped with the data collection in REEport for AREERA-funded research projects; this will eliminate some redundancy. By associating these research projects to POW through critical issues, this information extends the POW concept in describing the overall program of research and extension activity descriptions.

During this transition, NIFA continues to include Planned Program questions in REEport for Hatch and Evans-Allen research project initiations but will discontinue this practice after the November 2019 release. At that time, institutions will select a critical issue in lieu of a planned program for all newly created Hatch and Evans-Allen research project initiations. Institutions will have the ability to associate critical issues from their Plan to active research projects through the project change process. The ability to initiate extension programs will be added at a later date. Those initiations will be required to associate a critical issue from the Plan to the extension program in similar fashion. The institution's portfolio of research projects and extension programs will satisfy the overall AREERA requirement that extension programs and research projects will address the critical issues in the state.

Will I continue reporting jointly if my state has more than one institution such as having both 1862 and 1890 institutions?

Most states will continue reporting jointly, although a few have opted to split. The current way states with more than one institution are reporting, whether jointly or split, will be "frozen" for the first five (5) years of the new system, at which time NIFA will revisit this decision.

Will I continue reporting jointly for both research and extension?

Yes, research and extension will continue reporting together.

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What are the names of the fields and their rules such as character limits of the fields in the new Plan of Work report for FY 2020 and beyond?

The names of the fields and the rules and character limits are the same as they are in the current POW system. The following table provides additional details. The new fields for Critical Issues also are listed. As NIFA continues gathering feedback, NIFA will adjust these rules where it makes sense and has already taken steps to improve them.

POW field	Required	Rules and Character Limits
Executive Summary	Yes	**76,000 characters (increased based on user feedback)**
FTE Estimates	Yes	• Numbers only • Greater than 0 • Max 9,999.9 (1 decimal)
Merit/Peer Review	Yes	3,200 characters
Stakeholder Input: Actions to Seek	Yes	3,200 characters
Stakeholder Input: Methods to Identify	Yes	3,200 characters
Stakeholder Input: Methods to Collect	Yes	3,200 characters
Stakeholder Input: How Considered	Yes	3,200 characters
Critical Issue name	Yes	**75 characters (increased based on user feedback)**
Critical Issue description	Yes	**1,750 characters (increased based on user feedback)**
Critical Issue term (short, intermediate, long)	Yes	Radio button selection
Critical issue (Science Emphasis Area)	Yes	Checkbox
Optional comments	No	3,200 characters

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Why do I receive errors that say I've exceeded the character count but I've checked and I am well under?

NIFA has identified a limitation with the Editor (WYSIWYG) which counts the HTML characters that encode it. NIFA will have adjusted the character counts and improved the allowable space and will continue to enhance this feature to provide a more intuitive experience.

How do I calculate FTEs?

One professional FTE is approximately 2,080 hours of staff time annually allocated to support program activities. Visit How to Report FTEs in the Plan of Work and Annual Report on the POW page under the Tools section of the NIFA webpage for more information.

Is financial reporting going to be required on all Extension Programs?

It will be required in later phases of the integration for Extension programs. NIFA is determining the best approach and are analyzing the current business practices in place for research. Research projects (Hatch, Hatch Multistate, Evans-Allen) already complete the REEport Financial Report each year, reporting expenditure data for the most recently completed federal fiscal year. The same report will be required for extension programs (Smith-Lever, 1890 Extension, Smith-Lever Special Needs) and will be due each February 1. The data from this report will be used to complete significant portions of the AREERA Annual Report. For more information on the financial reporting process and requirements, please see the REEport Financial Report Manual. Keep in mind that this manual currently only applies to research projects and competitive awards. It will be updated with extension relevant content once that requirement is in effect.

What is the planned schedule for REEport reporting due dates?

REEport Report	2019	2020	2021
REEport Initiations	Research only *Due: Ongoing*	Research only *Due: Ongoing*	Extension and Research *Due: Ongoing*
REEport Financials	Research only *Due: February 1, 2020*	Research only *Due: February 1, 2021*	Extension and Research *Due: February 1, 2022*
REEport Progress/Final Reports	Research only *Due: March 1, 2020*	Research only *Due: March 1, 2021*	Extension and Research *Due: March 1, 2022*

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What will happen with existing active research projects that will span the transition between systems, especially with respect to critical issues?

NIFA is still determining the cleanest and most efficient way to make the transition. The current approach will require a project change; however, updates to associate critical issues to existing research projects will not be mandatory at this time.

How can I view the previous Planned Program associated to my research project?

NIFA is working on a reporting feature to more easily see the alignments of projects to Planned Programs. NIFA will let everyone know when this feature is available.

What will happen with the Planned Programs in the FY 2019 Annual Report of Accomplishments and Results completed in the old POW in April 2020?

The old Planned Program references will be included in the FY 2019 Annual Report and then phased out. In the new system, programs and projects will be tracked and reported according to Critical Issues.

How can I be involved in providing input onto the design of POW Phase 2?

NIFA plans to hold sessions open to LGUs at least every three (3) months. NIFA is in the process of re-engaging several NIFA-LGU working groups and planning for the 2020 Panel of Experts. Additional details will also be listed on the Plan of Work (POW) and REEport Integration: Institutional Profile page, including ways to get involved.

For State Liaisons and National Program Leaders

What should I expect after the first release as a State Liaison (NPL, NIFA Liaison, etc.)?

In Phase 1, the 2020 Plan of Work review was shorter in length due to the reduced number of fields in the new POW format. Due dates remained 60 days after submission, though some adjustments were made to improve the timetables for reviews and requests for additional time.

In later phases, Planned Program data collection, including the addition of extension programs, will shift fully into REEport. Currently, research projects under Hatch and Evans-Allen funding (research projects) initiate and report annually through REEport. Smith-Lever 3(b) and 3(c) and 1890 Extension programs will, in the future, also initiate and report annually in REEport. The role you currently have in the Plan of Work as a NIFA Liaison and the alignment with states will be maintained in the new Institutional Profile. When updates to the NIFA Liaison assignments are made, REEport, the POW system and the Institutional Profile system will manage them accordingly.

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How will Planned Program data be treated during the FY 2020 transition year?

The last approved Plan of Work from 2017 spans five years until 2021. This listing still constitutes the Planned Program set for the FY 2020 Plan of Work. In addition, research project initiations in REEport represent the latest program of research for the state. In the second phase, extension programs will be initiated in REEport. The combined set of active and new research projects and newly initiated extension programs will collectively represent the Planned Program data for the state. The system will provide methods for obtaining the project and program listings for institutions.

How will brief summaries of multistate and integrated activities be treated during the FY 2020 transition year?

The last approved Plan of Work from 2017 spans five years until 2021. This listing still constitutes the multistate and integrated activities whether the Planned Programs or separate brief summaries were provided. In future phases, the FY 2020 OGFM supplemental forms will provide an opportunity to update the multistate and integrated activity brief summaries and provide projections for FY 2021.

Are annual Progress Reports required for all Extension Programs and Research Projects in REEport?

In later phases of the integration, yes. Because annual progress reports at the research project and extension program level will be used to complete large portions of the POW Annual Report of Accomplishments and Results at the Institutional Profile level, annual progress reports will be required. The goal is to leverage these reports to avoid duplicative reporting and reduce burden on the LGU partners.