

FFY17 PEARS PSE Reporting

Overarching questions

Deciding whether to report on a site for FFY17

1. *How do I know for sure that I need to do this reporting?*
All LIAs working on any PSE activities should complete a PEARS PSE report.
2. *What if the site agreed to participate but work will not begin until FY 2018 or a site agreed but no longer can continue with partnership?*
If the site agreed to participate, please complete a report. If a site agreed but no PSE work, not even planning, was conducted in FFY17 you do not need to report.
3. *We have PSE work happening in two neighborhoods where plans will be developed this FFY. The sites, however, may not be identified until next FFY. Do we need to submit a PSE and how would we do that without an organization?*
You do not need to report on that PSE if sites have not been identified.
4. *What if the PSE is large scale (i.e. Active Transportation) involving multiple LIAs? Is each LIA responsible for reporting or only one of those?*
When multiple SNAP-Ed funded agencies are collaborating on PSE efforts, please refer to the IWP to designate the lead agency for reporting the PSE in PEARS. Multiple agencies should not be designated as delivering the same PSE at a site in the IWP. Identify the lead agency doing the PSE work at that setting and have just that LIA report.
5. *When multiple agencies coordinate delivery of different PSEs at a site, who reports the PSEs?*
If multiple agencies are working on different PSEs (for example UCCE – garden; CDPH – access to water), each agency will report their specific PSE effort into PEARS.
6. *When are physical activity interventions such as CATCH reported as a policy, system and environmental change (PSE) activity and when are they direct education?*
Physical activity interventions such as CATCH should be reported as a PSE activity when an intentional effort has been made to institutionalize the CATCH activities through training of school, preschool or afterschool staff. Depending how the CATCH activities were implemented and institutionalized specific PSE changes might be appropriate to report e.g.
 - a. Training school staff with responsibility for physical education to incorporate CATCH activities would best be captured by the PSE change option “improved quality of physical education”
 - b. Training teachers to incorporate CATCH activities during recess would best be captured by the PSE change option “increased or improved opportunities for physical activity during recess”.
 - c. Training after school staff to incorporate CATCH activities would best be captured by the PSE change option “improved access/opportunities for structured physical activity on site.”

However, if UC CalFresh educators are themselves directly delivering the CATCH activities this would be reported as direct education. The important point is whether increased access to physical activity occurred because of policy, systems and/or environmental changes made at the site rather than direct education that UC CalFresh educators are providing.

FFY17 reporting

1. *When will PEARS PSE site be up and running?*

You may begin to enter data on August 21, 2017

2. *Who reports PSE efforts in PEARS?*

County programs will determine the best internal staffing for reporting PSEs in PEARS. Some potential suggestions for organizing PSE reporting include: 1) identifying staff as leads for reporting PSEs for specific sites, 2) designating staff as leads to report on a specific PSE topic (SLM, gardens, etc.), 3) all staff working on PSEs enter the PSE work they completed --use permissions to provide editing rights so multiple staff can report on PSE efforts at the same site, and 4) designate office staff to enter PSE data into PEARS.

3. *How frequently should we enter data into PEARS?*

For FFY17 you will enter data by October 6th. Beginning in FFY18 the system will be available continuously and you may enter data when you like.

4. *Do you want PEARS files for PSE sites discontinued in FFY17?*

If no PSE work was conducted at the site in FFY17 then you do not need to enter data.

5. *For the end of fiscal year 2017, we can continue to enter our nutrition education data into ATF and PSE data into PEARS?*

Yes, that is correct. (Note: For UC CalFresh, LIAs will continue to enter nutrition education data into the Reporting Tools Workbook (RTW) and PSE data into PEARS.)

6. *Are all the LIAs using this and is there one administrator for each county?*

Yes, for FFY17 all LIAs will report PSE data into the PEARS system. There is not an assigned administrator for each county.

7. *When is the FFY17 PSE report due?*

All PSE data must be entered no later than October 6, 2017. **This deadline is firm.**

Questions related to FFY18 PEARS reporting:

1. *What is the difference between PEARS and ATF? So going forward we will only use PEARS and not ATF?*

The Activity Tracking Form (ATF) is used by all LIAs except for UC CalFresh to collect program activity data (direct education, indirect education). The Program Evaluation and Reporting System (PEARS) is the system that all LIAs are using to report PSE activities for FFY17. Beginning in FFY18 all LIAs, including UC CalFresh, will use PEARS for reporting all program activity, PSE, social marketing, direct education, indirect education and partnership work.

2. *When will the training for the new system take place?*

Trainings for the full PEARS system will be held in the fall.

3. *For FY18 is there a deadline for that ongoing reporting, e.g., quarterly, monthly?*

This is still to be determined.

Technical questions

- 1. Can entries be saved and edited later?*
Yes, be sure to save each section when you complete it.
- 2. Can you edit previous entry after you have saved it?*
Yes, you can. If you have already marked it as complete, you will need to mark it as incomplete before you can edit.
- 3. Can multiple people enter at the same time?*
Yes, more than one person can be in the system at the same time. We do not recommend that more than one person work on the same entry at the same time.
- 4. Can you copy current PSE site as a template for other PSE site entry?*
No, that is not available in PEARS.
- 5. What happens when you press save and not continue? How and where is that document retrieved?*
If you select save, the report is saved and you remain on the same page; if you select save and continue, the report is saved and you move to the next section. To work on the report again you select it from your list of PSE Site Activities.
- 6. Is there a fillable PDF of the updated PSE report template with all the recent changes made in PEARS for FFY17?*
This year there is a Microsoft Word version of the PSE report; there is not a fillable PDF.
- 7. Can you jump from the topics listed in the progress bar or do you have to complete previous sections to move on?*
Once the General Information section is complete you may jump to any section.

User accounts

- 1. Is there only one account for PEARS per organization right now?*
No, there can be multiple users per organization.
- 2. How can I add other users?*
Please refer to the directory in PEARS and contact your User Manager/SIA lead. The directory can be found under help feature (designated by a ?) to the left of your name.
- 3. Is there guidance for LHDs who work with subcontractors for establishing access to PEARS?*
Accounts may be established for subcontractors. The LIA should determine whether they want subcontractors to enter data into PEARS or whether the LIA wants to enter the data.
- 4. How can I retrieve my login name?*
Your login is your email.
- 5. When will we be receiving that email for login and the password?*
After the user account is created, you will receive a welcome email. If you have already requested a user account and have not received a welcome email please contact your user manager/SIA lead.

Access to previous year's data

1. *Can we access data we entered last year in PEARS? Do we create a new data entry for each fiscal year or just continue to develop on previously entered work from last fiscal year?*
You may copy entries from last year to use as a starting point for entering FFY17 PSE activities. Some of the fields will remain populated. Those that require new information will be blank.
2. *Does only the person who entered data in FFY16 have access to the files entered into PEARS last year?*
Yes, but if that person is no longer with your organization you may request that the PEARS team change ownership. You may request this through this contact us feature in PEARS.
3. *Will historical ATF data be loaded into PEARS in FFY18?*
No, past ATF data will not be available in PEARS.

Permissions/editing entries

1. *Does the administrator have permission to edit any data entered by the user? Will there be Super Users to help with data quality control?*
There is not an assigned LIA administrator. Other users from your LIA can see what was entered, but cannot edit. Users may grant permission for others to edit their entries.
2. *If I give permission to somebody to edit my data and he makes changes will it show in the data who enter the changed data?*
The name of the last user who saved the PSE site activity will be listed in the row titled "last modified by" on the PSE summary page. The date "last modified" is displayed in the last column of the PSE Site Activity listing. However it will not indicate what changes were made.
3. *Can I add to a PEARS PSE site activities created by another member of my team?*
You will need to give editing access to other members of your team, so they can edit your PSE site activities. To do this click on Manage Account (located in the top right corner of PEARS when you hover over your name) and select the Permissions tab. You can add team members by typing their names.

General Information Section

1. *For tracking purposes, are we entering data per site or per activity or per PSE?*
PSE activity is reported by site.

Sites

1. *How do we add sites in PEARS?*

Sites for FFY 17 should not be added unless the site(s) have already been approved through the Site Change Process (See Program Directive 2017-01

https://snaped.dss.ca.gov/resources/Resource%20Documents/Program%20Directive%20%2017-01_FINAL%20DRAFT%2011-10-16.pdf. LIA's may add new sites for FFY17 only to PEARS.

Please check to ensure that the site does not already exist under a different name by look for site name and address. If you are unsure, please contact Evan Talmage evan.talmage@cdph.ca.gov or for UC CalFresh Jennifer Quigley jaquigley@ucdavis.edu. Once the site is added if you have not already done so inform Evan Talmage (evan.talmage@cdph.ca.gov) and Jennifer Quigley jaquigley@ucdavis.edu by sending an email with the following information:

- a. County
 - b. Program (UCCE, CDPH, CDA, CCC)
 - c. Site name
 - d. Site Address (Street, city zip)
2. *What if there are duplicate sites in the system?*

If there are duplicates please contact Evan Talmage (evan.talmage@cdph.ca.gov).

3. *How do we report a district level policy change when the district is not on the site list?*
See instructions above about how to add a site; school districts may be added to the site list following the instructions above.
4. *What is the difference between site and organization?*
Organizations are overarching entities such as school districts, retail chain office, and district headquarters. For PSE reporting, you should only select an organization when the changes adopted were at the organizational level. You should not select an organization in order to summarize changes that happened at multiple sites.

Intervention name

1. *What "Intervention Name" should be selected for community sites such as day/wellness centers for the ill/disabled, social service centers, immigration/refugee offices or service locations, etc?*
Please select "Other, please specify."
2. *What "intervention Name" should be selected for SNAP offices and adult education and job training sites?*
Please select "Worksites & Related."
3. *What "Intervention Name" should be selected for WIC offices, libraries, and family resource centers?*
Please select "Learning Sites, Other."

USDA summer meal site, Indian reservation, military base

1. *Do I select the summer meals priority setting if I am not delivering SNAP-Ed or implementing PSE activities in coordination with the summer meals program?*
2. If you know the site provides summer meals, please check the box for summer meals.

Settings

1. *What setting should be selected for an independent community garden at a school, church, or work site?*
If the garden is used by the school, church, or work population please select the specific setting and not garden.
2. *In the training you said that if a garden is developed on an empty lot, not affiliated with a school or church, for example, to select Garden as the setting. When would we choose Park and Open Spaces?*
Please select Park and Open Space when a community garden was added to an existing park. For CA SNAP-Ed we will use Garden as the setting for a garden developed on an empty lot. We will not use the Open Space option.
3. *What setting should we select if we are working with youth who are from an afterschool program, for example, but are working on a PSE at a park?*
In this case you would select Park as the setting. The intent is that you select the setting in which the PSE activity is taking place.
4. *How would we report policy work with a non-profit that operates with youth on a school site (or multiple school sites)? The non-profit is separate from the school and runs an afterschool program.*
Select afterschool as the setting.
5. *If we are drafting a policy that will be implemented agency-wide, affecting multiple sites, then each site must reflect that policy implementation?*
Yes, if a policy was adopted for an organization and then implemented at individual sites, please report on implementation at each site.
6. *What are the consequences to mislabeling our sites/settings on PEARS?*
The main consequence is that we would not have accurate representation of where we are working on PSE changes in California.

Intervention topic

1. *Can you choose more than one intervention topic?*
 - a. Yes.

Attachments

1. *What type of pictures do you want to have uploaded?*
This feature is available for you to share pictures that represent your PSE work, for example, before and after pictures of an environmental change.
2. *Will you include file limit and file acceptance types in the attachment description for clarification?*
Yes, the PEARS team will add that information.

3. *If pictures are attached, must a photo release also be provided for documentation or is it assumed the agency submitting has a release on file?*

Programs are required to have photo releases on file for all photos they use and share. This includes those uploaded to PEARS. Please do not upload the photo release to PEARS.

Needs, Readiness & Effectiveness Section

1. *What if you did assessments over a week period?*

Please provide your best estimate by selecting a date from within that range.

Strategy Section

1. *Please explain how we should enter indirect education for FFY17.*

In FFY17 indirect education should be entered as in the past – on the ATF or the Reporting Tools Workbook (RTW) for UC CalFresh. In addition, if indirect education or promotion supported your PSE work you may also select Marketing/Promotion as a complementary strategy in the PSE report.

As an example, indirect education strategies such as use of Facebook and Social Media should be entered as Indirect Education through the ATF and RTW. They can also be entered as complementary strategies on the PSE module.

2. *Is an example of marketing/promotion any indirect education at a site where PSE activity is occurring (e.g., healthy purchase and donated food policy at a pantry and supporting indirect education materials distributed at the site)?*

Yes.

SNAP-Ed Funding

1. *Will you add definition for lead role/support role?*

Yes. You would select lead role if your LIA lead the PSE efforts at that site; select support role if your LIA contributed to PSE work, but did not have the lead role in those efforts.

2. *If there are multiple PSEs at one site and the funding roles are different for each, which funding role should you choose?*

If funding roles are different for different PSEs (for example, “Lead / Major Role” for garden and “Supportive Role” for SLM), select the highest funding level (“Lead / Major Role”) for the PSEs you are working on at the site.

3. *Are you only interested in Youth Involvement and not Adult Involvement?*

For the PSE work, some SIAs are specifically tracking youth involvement.

4. *Should all youth engagement projects be reported in the PSE module?*

Youth engagement is reported in the PEARS PSE module when an organized group of youth work on a PSE change (e.g., Youth Participatory Action Research (YPAR) team work on SLM changes, Student Nutrition Action Committee lead CATCH activities during recess). Peer-to-peer direct education alone would not be reported in the PEARS PSE module.

5. *I am part of the Shop Healthy Here Pilot Project. Is that listed as a program, package, or initiative?*

This pilot project is not listed but if you completed PSE work in stores that are in the pilot project you may select “other” from the list and write it in the “other” text box.

Changes Adopted Section

Changes

1. *How do we report taste test activities that were conducted in the cafeteria in partnership with the school food service program that were part of a larger Farm to School or Smarter Lunchroom Movement (SLM) intervention to improve the appeal and acceptability of local produce or specific fruit/vegetable offerings?*

Taste tests are one of the SLM strategies emphasized in the updated version of the SLM self-assessment scorecard. If the taste test was conducted as part of a larger PSE-oriented effort and in partnership with the food service program e.g. they provided the produce for tasting or they helped identify what items to feature based on the menu items they were planning, this can be considered a “practice” change to improve the appeal of healthy items. If these coordinated taste tests are planned for multiple sites or district-wide, this could also be considered a “systems” change. Since there is not a clear PSE change option that reflects cafeteria taste tests, please use the **“Were any other changes made that you were unable to locate in the list”** to add a brief description something like the following “In partnership with food service program, conducted cafeteria taste tests to improve appeal and acceptability of fruits and/or vegetables.” However, conducting independent taste tests in the classroom as part of regular direct education is not a PSE change since the point of purchase environment was not changed to increase the appeal of the healthy option and the taste test practice was not being institutionalized by the site but rather implemented as an interactive activity as part of the direct education provided at the school.

Helpful Hint

Changes adopted must be added one at a time. You may use the Word version of the PSE module to see the complete list of changes adopted. From this list identify a keyword and type it into the search function to more easily find the change.

Reach

1. *Are we reporting the demographics for those reached? Should we gather more demographic data or use "unknown"?*

It is not a high priority to report "Characteristics of those reached" in PEARS PSE. These reporting fields will be updated and more user-friendly in FFY 2018. It is better to select "unknown" than to estimate demographics.

2. *Is this where we would enter data card info? Where do we enter "decline to answer" data under ****Characteristics of those reached****? We are not going to be required to keep Data Cards on participants of PSE activities correct?*

You are not required to collect data cards for PSE activities. For FFY17 this information should be reported in the ATF and the RTW. In FFY18 you will enter data card information in the program activity module in PEARS.

3. *How do you count the same person with whom you have multiple contacts across several PSE sites, for example meal sites?*

It is likely that some people will be counted more than once if they are exposed to PSE activities at multiple sites or settings.

4. *If the total number of reached people changes throughout the year, do we go back and update this?*

Yes, please update the numbers in the PEARS PSE module to reflect the total unduplicated reach at the end of the FFY.

Individual Effectiveness Section

1. *Can you provide a specific example of Individual Effectiveness?*

If you are measuring the effect of the changes made at a site on people who are exposed to PSE change you will enter information into the Individual Effectiveness section. Here you will specify the ways you have tracked the impact of your PSE work at the individual level. This may be through surveys, interviews, focus group, or direct observation. An example would be surveying students about water consumption before and after the installation of a water hydration station at their school to determine whether students drank more water following the installation.

2. *Would it be appropriate to include anecdotal comments from teachers when reporting on school wellness policies?*

You may include anecdotal comments if those would be helpful to you for evaluation and program planning. We are not likely to summarize those or use in required reporting.

Recognition and Media Coverage Section

1. *Do school or district newsletters count as media? Are church bulletins also considered media coverage?*

If the content of the newsletters was about or in support of the PSE efforts at the site then they should be included in media coverage; select other for coverage type and type in newsletter.

2. *If we post about our PSE on Facebook, would this be entered into media coverage?*

Yes, select social media as the coverage type.

3. *Can you add multiple recognition or media coverage?*

Yes, once you complete all required information for one item you can select “Add recognition and media coverage” again to add more.

Sustainability Section

1. *Last year we were required to put a "Yes" on the Sustainability screen. Do you again want the default answer to be "yes"?*

This year we recommend that you look at this section to see what is being collected and begin tracking those type of sustainability mechanisms (You could use the Word version of the module to see all of the questions). If you did not make any efforts during this reporting period to support sustainability please respond “no” to the initial question.

Reflection Section

1. *Is the reflection section replacing the success stories?*

No, for FFY17 you will not complete the success story module in PEARS.

Mark as complete

1. *When entering PSE in PEARS for FFY 17 would we mark as complete even if it's in progress?*

Yes, “mark as complete” means that you are done entering PSE information for that site in FFY17.

Reports

1. *Can we pull reports at a county level across all LIAs?*

No, the data are stored separately for each state agency.

2. *Will we be able to print the final report?*

Yes, you are able to print the summary page by right clicking and selecting print.