**Reporting Organization-Level Activities in the PSE Module**

# **What are organization-level PSEs?**

**Organization-level PSE** changes are those that occur at the “parent” organization that governs or provides direction for multiple sites. These PSE changes are implemented at the organization level and are intended to impact the nutrition and physical activity related policies, programs, practices, and environments at the sites under the purview of the parent organization.

Working at the organization-level to plan, assess, design, implement and/or monitor PSE changes can have many benefits, especially in terms of reach and efficient use of resources. Local Health Departments are encouraged to seek partnerships with organizations to make this type of strategic and broader impact possible.

Organization-level PSE work commonly occurs in school districts. Examples of organization-level PSE work for a School District may include the following:

* School District Wellness committee triennial assessment of the district school wellness policy
* In collaboration with the District Food Service Director, adoption of new district-wide school foodservice practices (e.g., serving a variety of fruits and vegetables, new standardized recipes, etc.)
* In collaboration with the District Physical Education and Activity Specialist, plan and implement professional development training and materials distribution to Physical Education Specialists throughout the school district.

Organization-level PSE activities can also happen in organizations that are not school districts, and may similarly include wellness policies, trainings, standardizing recipes, food procurement or donation specifications, etc. that are carried out at a parent organization.

Organization-level activity and effort may be similar to PSE efforts happening at the individual site level. However, the implementation of PSE changes at the organization-level is distinct from, but can certainly support and complement, PSE work that occurs at the individual sites within the same organization.

The objective of this job aid is to help the local health departments and their subcontractors accurately determine at what level the PSE related work occurred (site vs. organizational) and how to complete the PEARS PSE reports, including any custom and supplemental questions, accordingly.

## **PEARS PSE Activities – organization- vs. site-level reporting**

**When should you report PSE activities at the organization level?**

* When the PSE change or strategy occurs through the “parent” organization which governs or provides direction for multiple sites (e.g., a school district, a grocery association, a food bank, etc.).

**When should you report PSE activities at the site level?**

* When PSEchanges are implemented directly at the site level (e.g., an individual school, store, ECE site, food pantry, etc. that an LIA partners with to plan and implement PSE work).
* This PSE activity is reported into PEARS separately for each site
* *Note: This reflects a change in guidance – LHDs no longer have to create PSE entries for sites they aren’t working in directly.*

**Examples of organization- vs. site-level PSE efforts:**

*Organization-level PSEs:*

* Change to a school district wellness policy
* Change to procurement standards for a food bank governing multiple food pantries
* Change to marketing policy for a chain of grocery stores
* CATCH training for a group of ECE providers coordinated through the county referral and resource center
* CATCH training at the district level with all PE specialists in order to roll out CATCH PE at all schools
* Working with a farmers’ market association to help all markets in eligible census tracts accept CalFresh benefits and/or offer Market Match

***Not*** *organization-level PSEs:*

* Making the same change at multiple sites by working with the sites one-by-one, such as implementing Smarter Lunchroom practices at several sites in a school district
* Conducting separate CATCH trainings at multiple ECE or school sites, each one intended to benefit that individual site only
* Working with individual stores in the same grocery chain to improve the placement or display of healthy foods

### **What should you report into the PEARS PSE module?**

Start by creating a report for the name of the organization you are partnering with. If the organization is not available on the PEARS site list, make a request to add a new site, using the [site management form](https://ucanr.co1.qualtrics.com/jfe/form/SV_cG6poGasYAylAb4).

Below are examples of the specific changes adopted, possible PSE implementation scenarios, and additional guidance on reporting reach and site-level PSE implementation for common categories of organization-level PSE change.

#### **Category: Written Policies**

*Adoption or revision of written policies and policy related activities (e.g., wellness committees, systems to monitor or evaluate policy implementation)*

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| --- | --- | --- |
| **Types of changes adopted** | **Reporting reach** | **Additional reporting** |
| * Food/beverage or nutrition related policy (childcare wellness, school wellness, workplace wellness, etc.)
* Physical activity policy (childcare wellness, school wellness, workplace wellness, etc.)
* Other changes that involved creating new or improving existing written policies
 | Per the [reach support documentation in PEARS](https://support.pears.oeie.org/document-reach/), written policies that have not yet been implemented have a reach of 0. Once implemented, the reach is the number who come in direct contact with the practice, program, or environmental change this year that resulted from the policy.  | * Custom questions and supplemental survey regarding organization-level PSEs
* Separate PSE Activity reports for each SNAP-Ed eligible site that the LIA works with directly to plan and implement PSE changes intended to benefit that site specifically
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**Example:** A school district adds language to the district wellness policy specifying a minimum number of minutes of PE for each grade level and that PE must be taught by credentialed PE teachers.

**What to report for the organization:**

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| --- | --- | --- |
| **Site/Org Name** | **Change adopted:** | **Reach:** |
| Name of school district | Physical activity policy (childcare wellness, school wellness, workplace wellness, etc.) | **If there is a mechanism to confirm the policy change was implemented at the site-level:** The unduplicated number of students affected by the policy at SNAP-Ed eligible school sites**If there is NOT a mechanism to confirm the policy change was implemented at the site-level:** unknown |

##### **Category: Food-Related Practices**

*Food procurement and/or changes to menus and recipes developed at the organization-level*

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| --- | --- | --- |
| **Types of changes adopted** | **Reporting reach** | **Additional reporting** |
| * Food purchasing/donation specifications or vendor agreements towards healthier food(s)/beverages
* Farm-to-table/use of fresh or local produce
* Menus/recipes (variety, quality, etc.)
 | Report the total unduplicated reach of those affected by the food procurement change this year. If this is unknown, see below for instructions on reporting an unknown reach. | * Custom questions and supplemental survey regarding organization-level PSEs
* Separate PSE Activity reports for each SNAP-Ed eligible site that the LIA works with directly to plan and implement PSE changes intended to benefit that site specifically
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**Example:** A food bank changes their donation specifications and no longer accepts sugar-sweetened beverages or candy. Clients that visit food pantries that receive food from this food bank are reached by this change, since member agency pantries receive fewer or no SSBs or candy.

**What to report for the organization:**

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| --- | --- | --- |
| **Site/Org Name** | **Change adopted:** | **Reach:** |
| Name of food bank | Food purchasing/donation specifications or vendor agreements towards healthier food(s)/beverages | The unduplicated number of clients who receive food from the food pantries who are member agencies of the food bank |

###### **Category: Professional Development**

The PEARS PSE changes list includes two professional development related PSE changes – see first column of the table below. These are categorized as *Systems* changes and should **only** be reported when all the following are true:

1. Professional development is a central and intentional focus for this PSE activity and partnership,
2. Implementing professional development that has defined learning objectives, training/resource materials and is a structured training or capacity building effort linked to an evidence-based PSE change or intervention, and
3. Multiple sites or multiple staff or community members at a single site were involved in the professional development.

If the above conditions are not met, the training should instead be reported in the *Strategy* section of the PSE module. Select “Staff training on continuous program and policy implementation” under *complementary activities*.

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| **Types of changes adopted** | **Reporting reach** | **Additional reporting** |
| * Professional development opportunities on nutrition (e.g., nutrition standards, gardening, breastfeeding, etc.)
* Professional development opportunities on physical activity
 | Include the reach of the SNAP-Ed eligible sites governed by this organization and affected by this change this year, if a mechanism exists to confirm PSE changes were adopted at the site level due to this professional development. Otherwise, report reach as 0 or unknown (see below for instructions on reporting an unknown reach). | * Custom questions and supplemental survey regarding organization-level PSEs
* Separate PSE Activity reports for each SNAP-Ed eligible site that the LIA works with directly to plan and implement PSE changes intended to benefit that site specifically
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**Professional Development Continued…**

**Example:** In coordination with the School District Physical Education and Activity Specialist, a half day CATCH training is provided to all the Physical Education (PE) Specialists working at schools in the school district. Materials and resources from the CATCH physical activity toolbox are also provided to all the PE Specialists for use with their PE classes at schools in the district.

**What to report for the organization:**

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| --- | --- | --- |
| **Site/Org Name** | **Change adopted:** | **Reach:** |
| Name of school district | Professional development opportunities on physical activity | **If there is a mechanism to confirm that PE specialists adopted new CATCH activities and techniques to improve the quality of PE at the school site:**The unduplicated number of students affected by the change that are enrolled at SNAP-Ed eligible schools in the school district**If there is NOT a mechanism to confirm that PE specialists adopted new CATCH activities and techniques to improve the quality of PE at the school site:** 0 |

**How to Report Unknown Reach**

Beginning with FFY 2024, in order to bring PEARS into closer alignment with national SNAP-Ed data reporting requirements, the ability to select “unknown” as a method to determine reach was removed, once changes are adopted. If you are actively implementing changes (i.e., are past the planning stage and have selected changes adopted), but you have no reach data and no basis for making a reach estimate, please do the following:

1. Select “Estimated” as the reach method
2. Select “Other” for the data source
3. Type in: “Unable to identify a source - reach unknown”
4. Enter zero for the total number of people reached.
5. Reach out to the evaluation team for your SIA. They may be able to work with you to find a reasonable reach estimate.

Here is a screenshot to illustrate these instructions:



**Additional reporting for organization-level PSEs**

All LHDs working on organization-level PSEs should complete both a PEARS PSE report and a supplemental survey to describe the organization-level PSE work. In addition to the guidance above about how to report and select site name, changes adopted, and reach, LHDs should also pay close attention to the “Custom Data” section.

In the “Custom Data” section of the PSE module, there are two questions:

* Are you completing this report for organization-level PSE activities?  Yes / No
* If this is an organization-level report, please provide more information using this survey link: https://tinyurl.com/OrgPSE

Has the survey been completed?  Yes /  No

Answer “yes” to the first question. Then, to complete the survey, copy and paste the survey link into your browser or click on the hyperlink in this job aid. If you are unable to fill out the survey at the time you are working on your PEARS PSE entry, mark “No” temporarily. Be sure to complete the survey at a later time and update this response to "Yes." We will send out reminders if we see a “yes” response for the first question and a “No” response for the second.

To complete the supplemental organization-level PSE survey, you will need the PSE site activity ID and site/org name so that we can correctly link your survey to your PSE report. The PSE ID can be found in the URL when you are working on or reviewing your PSE report in PEARS. The ID is the 5-digit number after “…track/pse/”.



This material was funded by USDA’s Supplemental Nutrition Assistance Program - SNAP.

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