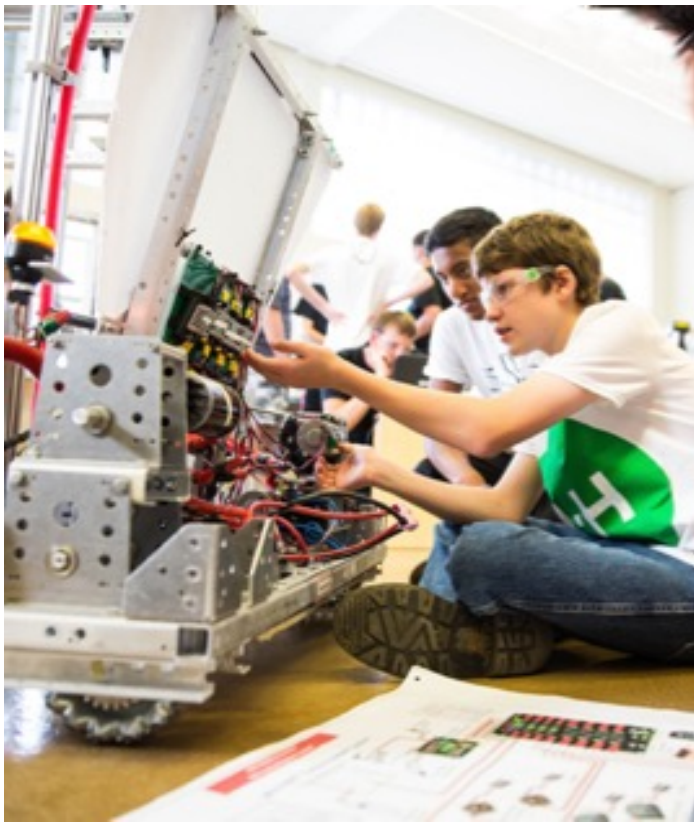
EXTENSION REPORTING SYSTEM

USER GUIDE

2019



NC STATE EXTENSION

CONTACTS

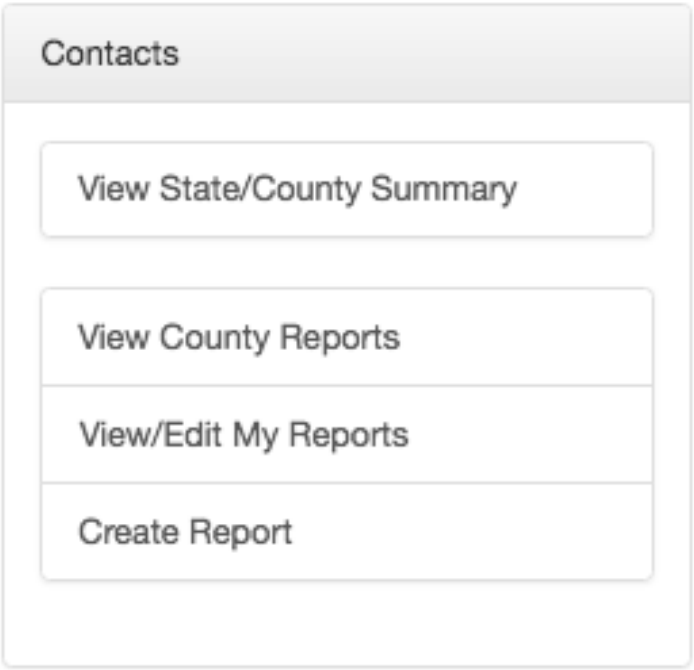
Contact reports allow Extension to demonstrate the number of direct and indirect educational interactions between Extension educators and member of the public in support of Extension objectives. By demonstrating that service is being provided regardless of race, ethnicity, and gender, contact reports also provide supporting evidence that Extension is in compliance with civil rights rules and regulations. Extension educators report both direct and indirect contacts in ERS. Reported contacts are limited to contacts with members of the general population and should not include contacts with other Extension educators, faculty, or staff. Reported contacts do not include materials or information communicated or distributed for the sole purpose of marketing or advertising an Extension event.

Direct Contact refers to the face-to-face interaction with clientele where there is an exchange of educational information. Direct contacts occur in office, field, or home consultations, conferences, workshops, seminars, meetings, and similar activities in which the educational mission of NC Cooperative Extension is carried out. Direct contacts may also occur by using web-based technologies such as zoom. Direct contacts are reported by race, ethnicity, gender, and age group.

Indirect Contact refers to the sharing of Extension information through sources such as mass mailings, newspaper, radio, television, websites, social media, phone calls, emails, and indirect interaction at public events. These are considered indirect contacts because the individuals with whom information was exchanged cannot be effectively identified or quantified and it's not possible to accurately determine the race, gender and ethnicity of these individuals.

Contacts Navigation Menu

The Contacts navigation menu allows you to view the state summary report, view county reports, view/edit your contact reports, and create contact reports.

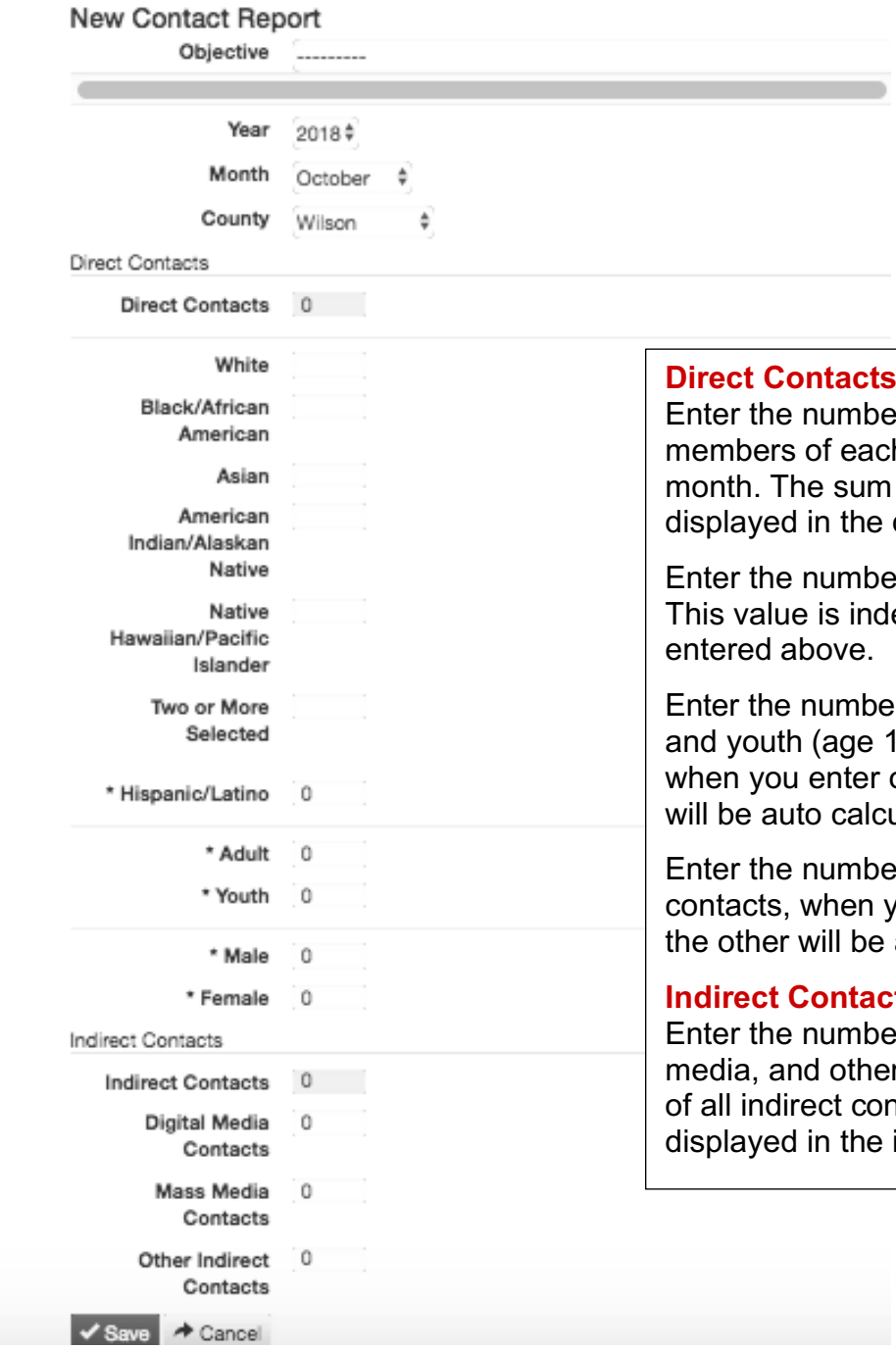


- Multiple contacts with the same individual may occur and be reported during a month.
- Multiple contacts with the same individual in the same day may occur if the substantive content of the contacts falls under different objectives; each contact would be reported under different objectives.
- Multiple educators may report contact with the same individual, if two or more county educators are responsible for a segment of a program activity, each educator may report the total number of contacts.
- Educators may report the contacts for programs in their county conducted by Specialists; if a county educator is responsible for scheduling, advertising, and facilitating a meeting or program activity in their county and a Specialist assists the agent in conducting the meeting or activity; the county educator should report the contacts in ERS.

Entering Contact Information in ERS

Report your contacts at least once a month for each objective you have data to report. Go to the Contacts navigation menu and click Create Report. The year, month, and your county will be prepopulated, change these values if necessary, then select an objective.

MOBILE TIP: ERS is designed to be mobile friendly. While at an event you can log into ERS and directly enter your contact numbers.



Direct Contacts
Enter the number of direct contacts with members of each race during the reporting month. The sum of the contacts will be displayed in the direct contacts box.

Enter the number Hispanic/Latino contacts. This value is independent of the race data entered above.

Enter the number of adult (age 19 and over) and youth (age 18 and under) contacts, when you enter one of the values the other will be auto calculated.

Enter the number of male and female contacts, when you enter one of the values the other will be auto calculated.

Indirect Contacts
Enter the number of digital media, mass media, and other indirect contacts. The sum of all indirect contacts entered will be displayed in the indirect contacts box.

Digital media contacts are a combination of any of the following metrics:

- Facebook Reach - The number of people who view your content. Go to Page Insights to view your Reach.
- Twitter Impressions - The number of times a tweet appears to users in either their timeline or search results. Go to the Tweet Activity Dashboard to view your Impressions
- Instagram Reach - The number of unique users that saw your post or story on any given day. Go to Instagram Insights to view your Reach.
- Wordpress Pageviews – The number of instance of a page being loaded (or reloaded) in a browser. Send an email to ces_help@ncsu.edu, for access to Google Analytics.
- YouTube Unique Viewers – The estimated number of people who watched your videos. Go to YouTube Creator Studio / Analytics to view your Unique Viewers.

Mass media contacts are a combination of any of the following metrics (you must maintain documentation from the media outlet of their reach or you may only report the number of times the activity occurred):

- Newspaper articles (number of articles x circulation)
- TV shows (number of appearances x viewers)
- Radio programs (number of appearances x listeners)

Other indirect contacts may include, but are not limited to, a combination of any of the following metrics:

- Displays, exhibits, or fairs – The number of people visiting the booth measured by using a counting device. This metric could also be collected by measuring the number of handouts or other materials distributed at the event.
- Telephone or E-mail – The number of information requests responded to via telephone or e-mail.
- Newsletters – The number of newsletters distributed in support of an Extension Program. For mailed newsletters, report the number of people sent the newsletter. For newsletters sent using Constant Contact, report the Open Rate not the number of people on your mailing list.
- Non-electronic Correspondence (Other) – The number of non-electronic correspondences mailed in support of the Extension Program. Examples of non-electronic correspondence are letters, factsheets, brochures, and other educational publications requested and mailed.

Save the contact report before moving on to complete a contact report for your next objective. If you have made an error and want to delete the report click on Cancel.

Viewing Contact Reports

Within the Contacts navigation menu, you are able to view contact reports at the state, county, and individual level.

To view your individual contact reports, select View/Edit My Reports. Then select the year, objective, and month of data you want to view.

To view contact reports for an entire county or for a specific employee within a county, select View County Reports. Select the year, county, objective, employee, institution, and month of data you want to view.

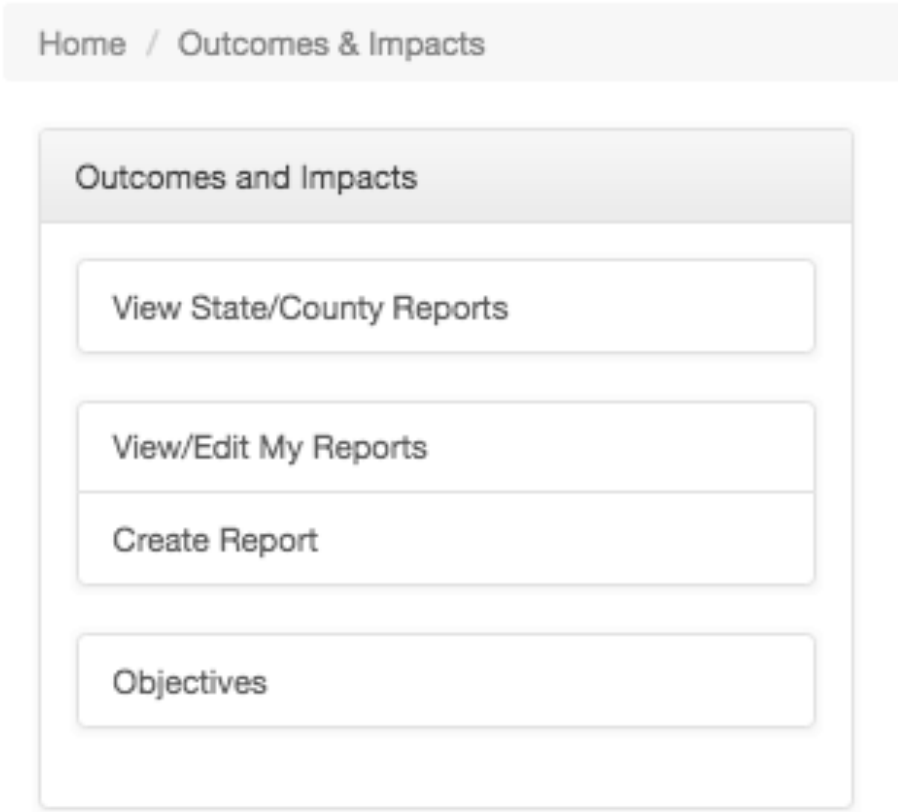
To view the state or county summary, select View State/County Summary. You can refine the state summary by changing the year, county, objective, month, and institution in the dropdown lists at the top of the page.

OUTCOMES AND IMPACTS

Outcomes and impacts reports allow Extension to track and report on the progress toward meeting individual and organizational goals. Outcomes and impacts are a key component in quantifying the impact, value or worth of the work that Extension does.

Outcomes & Impacts Navigation Menu

Under the Outcomes & Impacts navigation menu, state and county outcome & impact reports can be viewed and individual outcome and impact reports can be viewed, created, and edited.



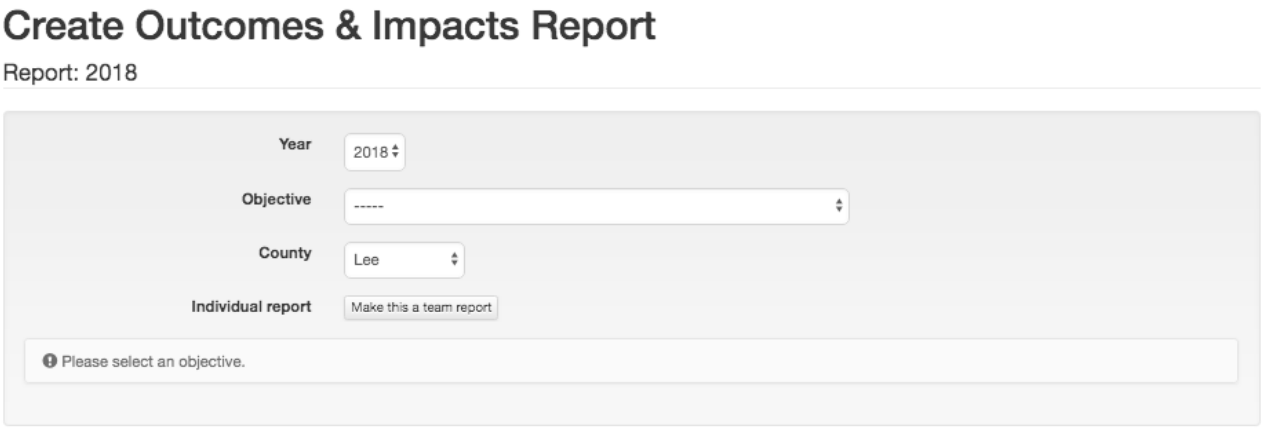
Entering Outcomes & Impact Information in ERS

Complete an outcomes & Impacts report for each objective you have outcomes to report on. Go to the Outcomes & Impacts navigation menu in ERS and click on the Create Report link. The year and county are prepopulated.

Select the objective associated with the outcomes being reported. Enter values for each reported outcomes.

If you are submitting a team report click, make this a team report, and select an existing team or create a new team. Include both county and campus based team members.

Save the outcomes & impacts report before reporting on another objective. If you make an error click on Cancel to delete the report.



Viewing Outcomes & Impacts Reports

Within the Outcomes & Impacts navigation menu, you are able to view outcome and impact reports at the state, county, and individual level.

To view your outcome & impact reports, select View/Edit My Reports. Then select the year and objective you want to view.

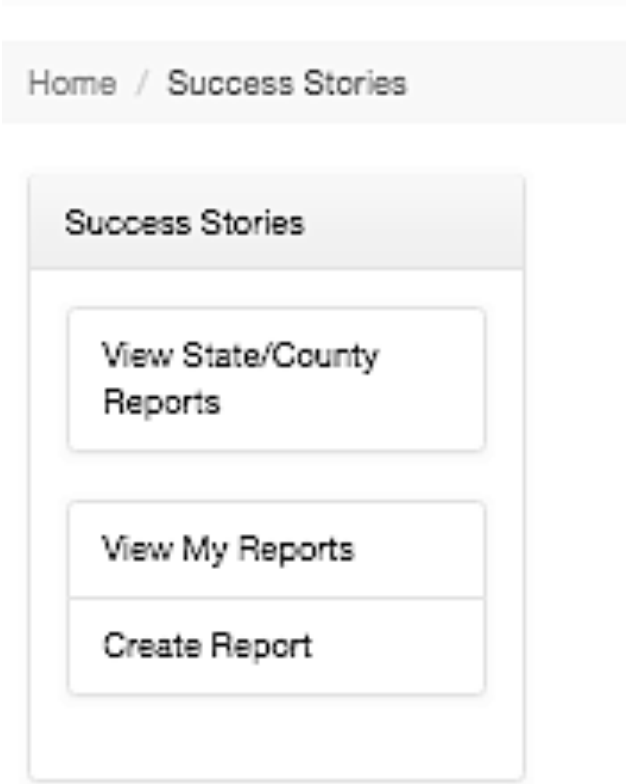
To view county and statewide outcome & impact reports, select View State/County Reports. Select the year, county, employee, objective, and institution.

SUCCESS STORIES

Success Stories are written to share the positive impact that occurred as a result of Extension's educational programs. Ideally, success stories should be entered as they occur.

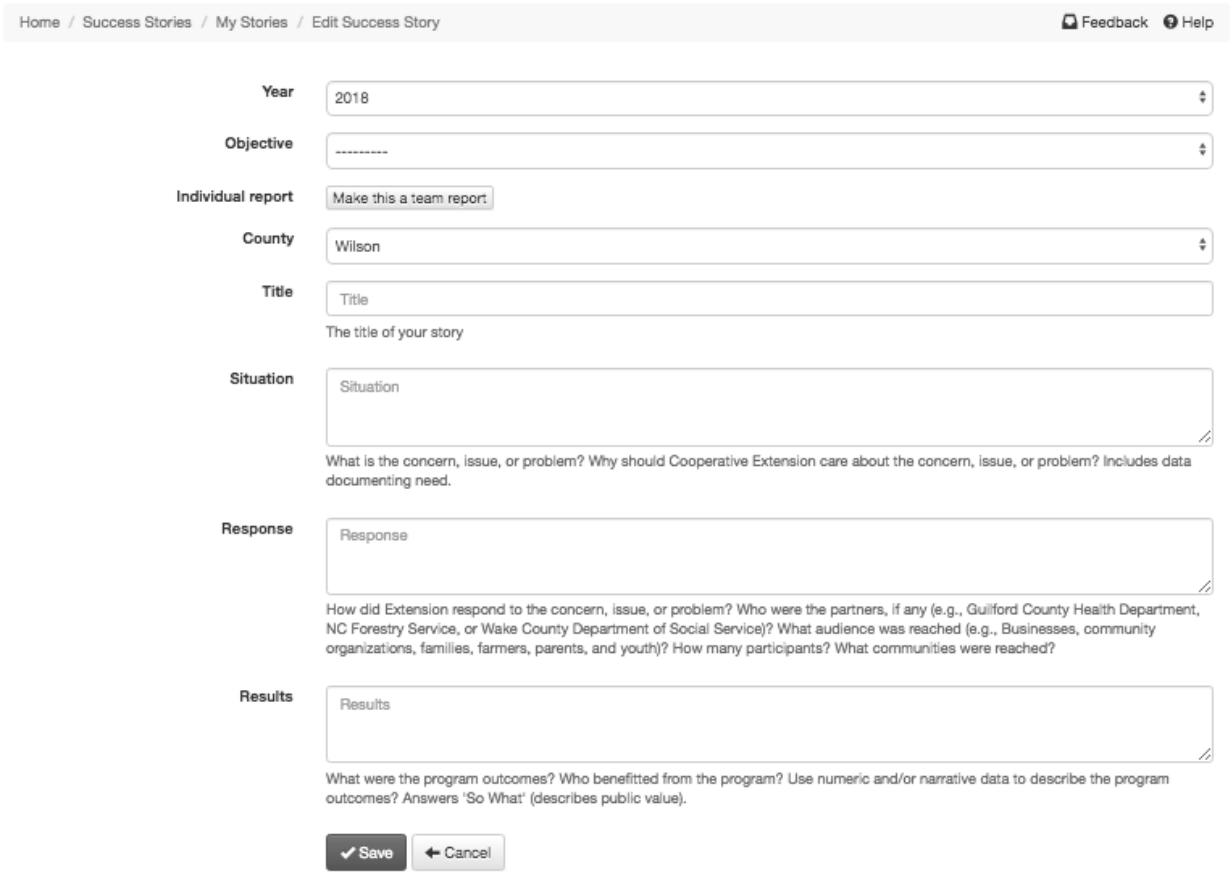
Success Stories Navigation Menu

Under the Success Stories navigation menu, county and state success stories can be viewed and individual success stories can be created, edited, and viewed.



Entering Success Story Information in ERS

To enter a success story, go to the Success Stories navigation menu in ERS and click on the Create Report link.



Select the year for the Success Story, the objective it is related to, the county it occurred, and give the story a Title.

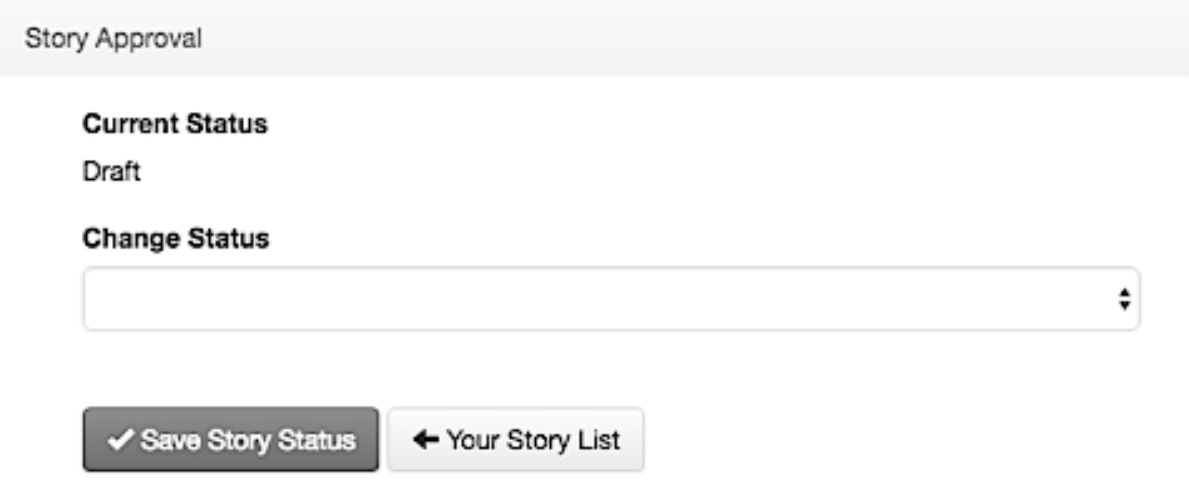
Describe the Situation by answering the questions: What is the concern, issue, or problem? Why is this an important concern, issue, or problem? Include data documenting the need.

Describe the Response to the problem by describing how Extension responded to the concern, issue, or problem; who were the partners, if any; what audience was reached; how many participants were involved; and what communities were reached.

Describe the Results by identifying the program outcomes and who benefitted from the program. Use numeric and/or narrative data to describe the program outcomes.

When entering a team success story, one person submits the story and enter the names of all team members by clicking on Make this a Team Report. There is an option to select an existing team or create a new team. Include all county based and campus based members of the team.

When finished entering all necessary information, save the story, review your submission, then change the status from Draft to Submit for Approval and Save Story Status.



Viewing Success Story Reports

Within the Success Stories navigation menu, success stories at the state, county, and individual level can be viewed.

To view your success stories, select View My Reports. Then select the year of data you want to view. Click on the title of the story to view, edit, or delete.

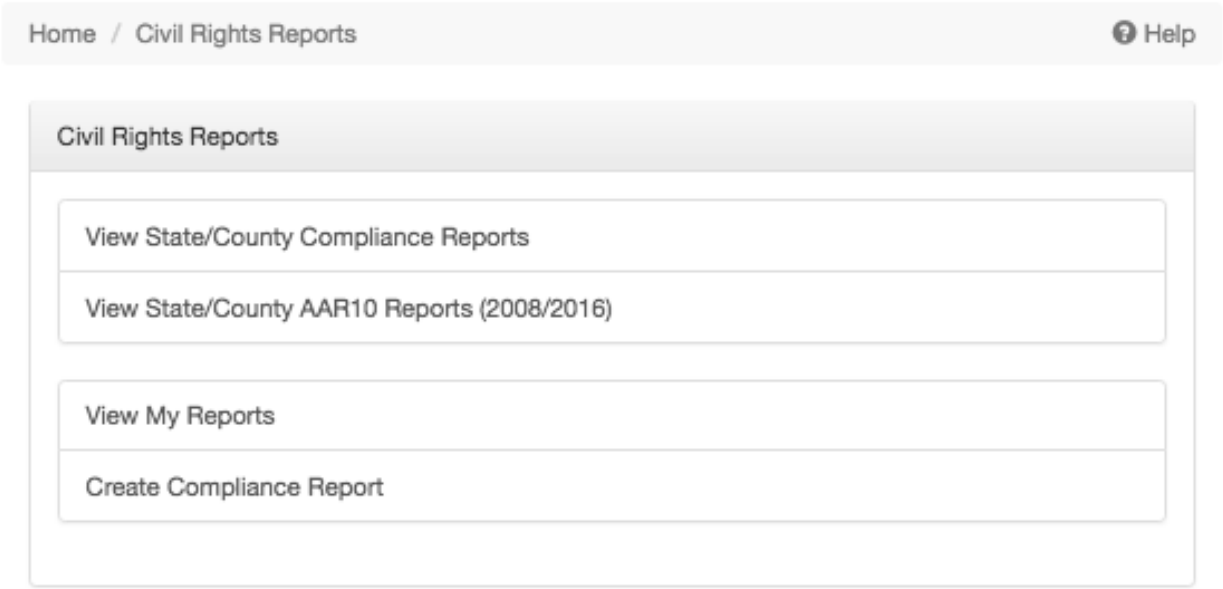
To view all state or county success stories, select View State/County Reports, then select the year, county, objective, and universities.

CIVIL RIGHTS COMPLIANCE

Civil Rights data is collected to ensure advisory system committees and identifiable groups are representative of the racial, ethnic and gender make-up of the community. Data on group composition should be entered at least once a year. Each advisory system committee (county advisory councils, program committees, specialized committees), each 4-H club, Extension Master Gardener Volunteer Program, Extension Community Association, Extension Master Food Volunteer Program, and and other identifiable Extension group that regularly meets throughout the year (identifiable Extension groups can be determined by asking yourself “would this group continue to exist without assistance from Cooperative Extension?”) must be reported in a Civil Rights Compliance Report.

Civil Rights Navigation Menu

Under the Civil Rights navigation menu county and state compliance reports can be viewed and individual compliance reports can be viewed and created.



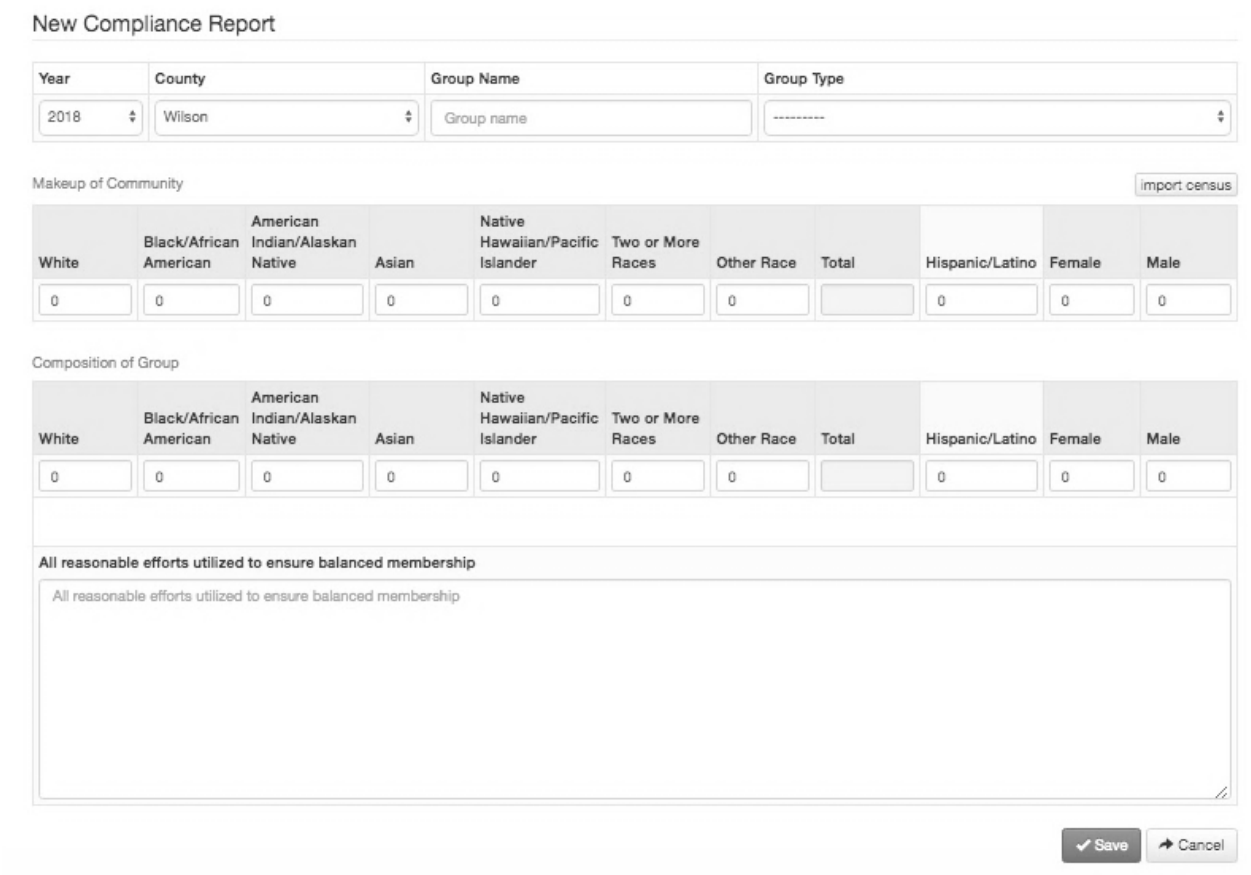
Entering Compliance Information in ERS

To create a compliance report, click on Create Compliance Report. The year and county are prepopulated. Type name of the group and select the group type. Import the census data for your county. In some instances you may also manually enter the Makeup of Community (for example, for the Ag Program Committees the Census of Agriculture would more accurately represent your population). If population data other than the US Census is used, you must maintain documentation of the data source and reason.

Enter the number of group member in each race, ethnicity, and gender group.

Provide the specific recruitment efforts that were made to ensure balanced membership on the council, committee, or group. If you did not achieve balanced membership, describe the actions you are currently taking to improve outreach to underrepresented groups to improve membership parity.

When you finish entering all necessary information, save the group and repeat for another group.



Viewing Civil Rights Reports

Within the Civil Rights navigation menu, Compliance Reports at the state, county, and individual level can be viewed.

To view your Reports, select View My Reports.

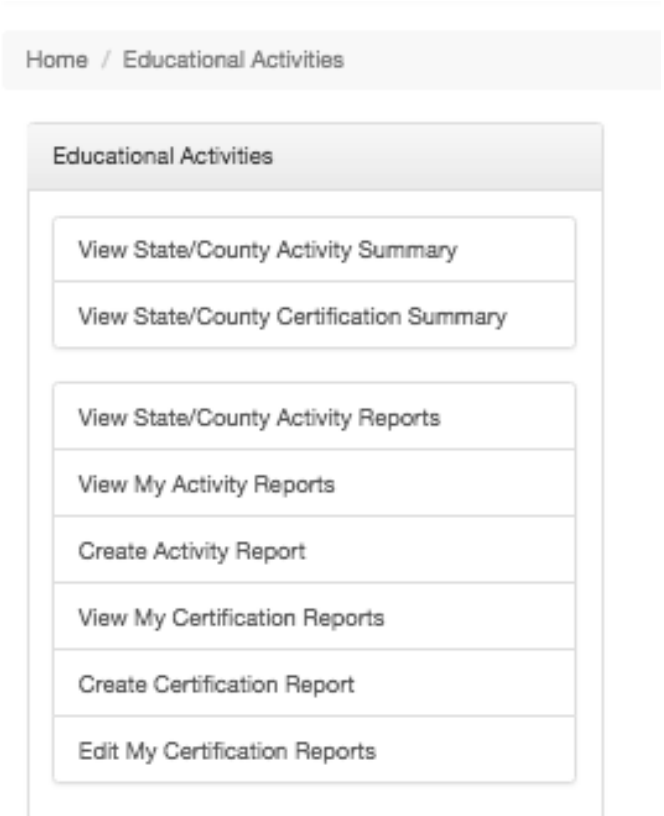
To view state or county Compliance Reports, select View State/County Compliance Reports, then select the year, county(ies), group type, and institution.

EDUCATIONAL ACTIVITIES

The Educational Activities module is used to report on planned educational activities, events, and certification programs delivered within your Extension program. Educational activities are restricted to events conducted for members of the general population and do not include training or other professional development activities provided to other Extension employees.

Educational Activities Navigational Menu

Under the Educational Activities navigation menu county and state educational activities and certifications can be viewed and educational activities and certifications can be entered, edited, and viewed.



Educational Activities (formerly non-degree credit activities)

Educational activities should be reported at least monthly, or immediately after an event occurs. Educational activities are characterized as having the intention to convey research based educational information or services in a structured face to face format to an external audience.

Your primary methods of reporting face to face interactions with clientele are the contact report and 4-H core elements report. In addition to the contact report and 4-H core elements report, you are required to provide more detailed information on interactions identified as educational activities. Educational activity reporting is required for those Extension activities that fall into one of three categories:

- Educational programs: The activity/event presents research based educational content to an external audience. Educational programs are generally curriculum based, meaning that a predefined research based lesson plan or outline is used. Participants must register (before, during, or after) for the event. A sign in sheet and demographic information is collected. A fee may or may not be charged. Generally, educational programs have a duration of at least 1 hour of information delivery; however some youth programs may have a shorter duration. Educational programs may occur over multiple sessions with a group of participants. Content may be delivered by an Extension educator, Specialist, or paraprofessional. Types of educational programs include courses, workshops, demonstrations, camps, school programs, educational presentations at meetings or conferences, field days, and tours.
- Consultation: Individual or small group assistance provided on-site at a farm, home, or other location in response to a request or known need of an Extension client. During the consultation, research based information is shared with the client. Consultations may be a one-time event or may require multiple follow-up visits. Consultations may include sampling, testing, or other techniques. Consultation may include coordinating the assistance of an Area Specialized Agent or an Extension Specialist.
- Facilitation: The activity involves one or more of the following (1) Facilitating meetings or events that involve various stakeholders such as Extension workgroups, boards, councils, commissions, or coalitions. Facilitating may include organizing the meeting or event; guiding conversations; summarizing diverse viewpoints so that stakeholders can address a problem and create a plan of action to address that problem; or they may seek solutions to a community identified need or opportunity through assessment, planning or implementation. (2) Convening groups by bringing together diverse stakeholders who represent a range of perspectives on a topic, often from different organizations to lead collective action. Convening is the leadership work of calling and planning the meeting, engaging

other entities to join in the work, and secure commitment for agreed upon action. (3) Representing Extension by participating in meetings or events that build diverse partnerships, collaboration, coalition building, and networks for effective problem solving and action within and across communities. Able to provide subject matter expertise during group discussions. May include representing Extension on workgroups, boards, councils, commissions etc.

Entering Activity Information in ERS

To enter information about an Activity, select Create Activity Report from the Educational Activities navigational menu. Select the objective, year, and county.

Enter the topic of the content delivered. If an Extension curriculum was used, list the name (for example Better Choices, NC SafePlates, or Pesticide V Training). When entering activity information for meetings, conferences, or consultations make sure to enter the specific topic you were talking about not the name of the meeting or group.

Select the type of activity. There are 3 types of activities to select from: educational program, consultation, and facilitation.

Enter the audience or group. Your activity may be for the general public; or your audience may be more specific such as Cattleman's Meeting or Ms. Smith's 4th grade. In the case of consultations identify if it was a farm, business, or home consultation (you do not have to identify the name unless you want this for your future reference). For facilitations, identify the name of the group.

Enter the number of registrants/attendees.

Enter the number of contact hours. Reported contact hours are not additive; for example if 10 people attended a two-hour conference, the number of hours reported is 2. ERS will calculate the total number of contact hours for the event by multiplying the number of attendees by the number of contact hours and display the value in the total contact hours block.

Note on contact hours: Report only the actual number of contact hours that you spend with an individual attendee. Example 1: A program goes from 8am to 5pm and includes a 1 hour lunch break. Even though the participants may be onsite for 9 hours, only 8 contact hours should be reported. Example 2: You take a group of 4-H'ers on a field trip from 8am-5pm that includes a 2 hour drive to the location, a 2 hour drive back, and a 1 hour lunch break. In this case only 4 contact hours should be reported. Example 3: You provide nutrition information at a 2 day county event and repeat a 15 minute presentation throughout the event to audiences that rotate through your booth. In this case, you only spent 15 minutes with each person you should not be reporting an Educational Activity, include the number of contacts in your monthly contact report.

Remember contact hours represent the amount of time spent with each individual attendee.

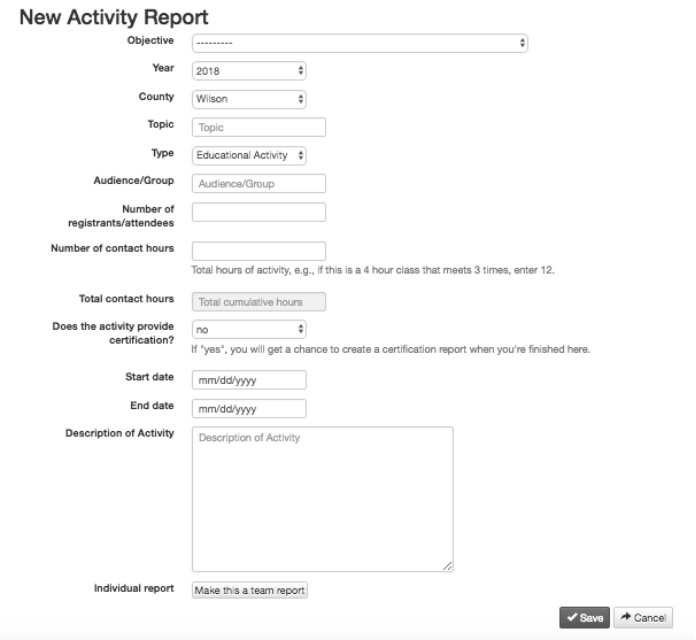
Select if the activity provides a certification (if a certification is provided you will be prompted to complete a certification report when finished).

Enter the start and end date of the activity. (Multiday activities should have the same participants registered throughout the duration of the program.)

Provide a description of activity indicating the key learning objectives.

If this is a team report click on make this a team report and select an existing team or create a new team. Include both county based and campus based team members.

Save your report.



Viewing Activity Reports

Within the Educational Activities navigation menu, activity reports at the state, county, and individual level can be viewed.

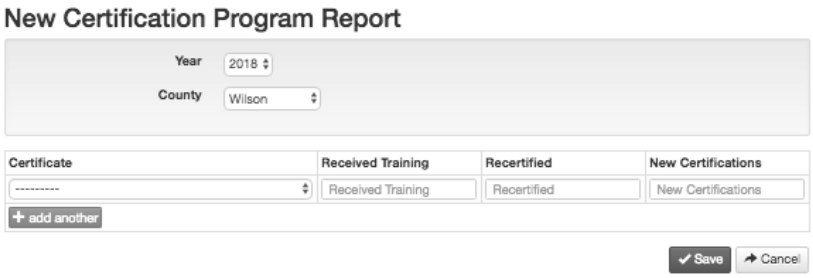
To view you're activity reports, select View My Activity Reports. You can refine your list by selecting the year, month, date filter, and objective of data you want to view. Click on the title of the activity to view, edit, or delete.

To view state or county activity reports, select View State/County Activity Reports, then select the year, month, date filter, county, objective, employee, and institution.

To view a county or statewide summary of activities select View State/County Activity Summary, then select the year, month, date filter, county, objective, employee, and institution.

Entering Certification Activity Information in ERS

To enter information about a certification activity, select Create Certification Report from the Educational Activities navigational menu. Select the year and county. Select the Certification being reported, enter the total number of people that attended the training, the number who were recertified, and the number of new certifications. Save your report.



Note: The number recertified and number of new certifications may not necessarily equal the number who received training. There may be individuals who receive training that do not qualify for certification or those who do not successfully pass certification requirements.

If you do not track whether attendees successfully achieve or maintain certification or if your training is only partial credit toward the total CEUs required for certification, leave the recertified and new certification blocks blank and only report the number of individuals that received training.

Viewing Certification Program Reports

Within the Educational Activities navigation menu, certification reports can be viewed at the state, county, and individual level.

To view your certification reports, select View My Certification Reports. Click on the title of the activity to view, edit, or delete.

To view state or county certification reports, select View State/County Certification Summary, then select the year, county, employee, and institution.

FISCAL RESOURCES

Fiscal resources reports provide information on external resources secured by Extension.

Fiscal Resources Navigational Menu

Under the Fiscal Resources navigation menu you are able to view county and state fiscal resources and view, create, and edit your fiscal resources.

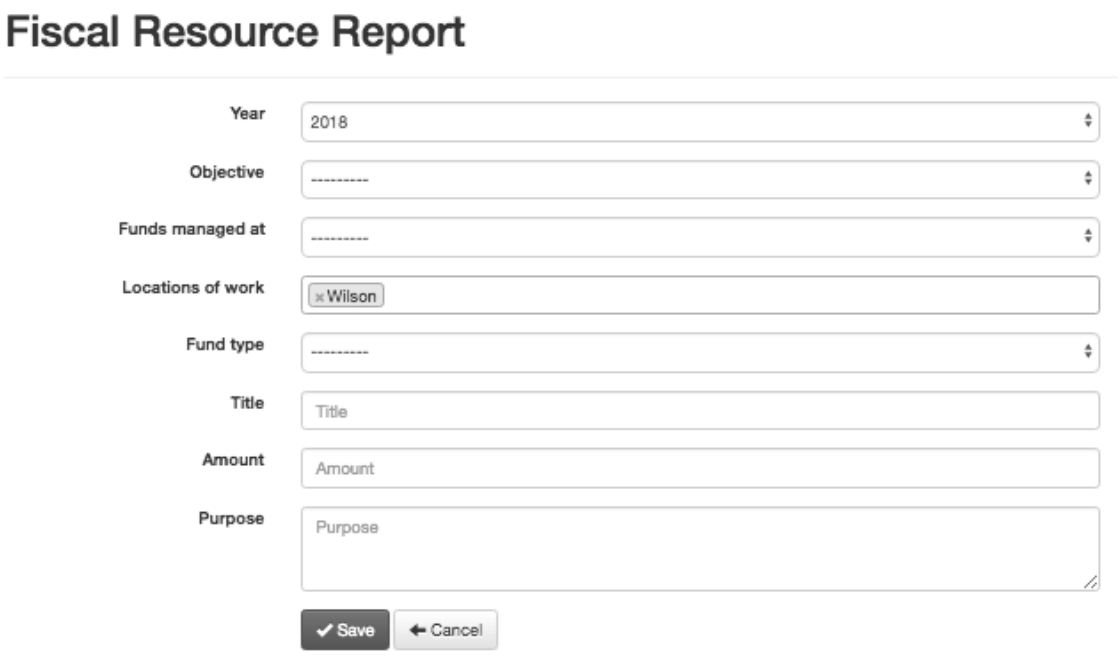
Entering Fiscal Resources Information in ERS

To enter information about fiscal resources, select Create Fiscal Resource from the Fiscal Resources navigational menu.

For each fiscal resource secured, select the year, objective, location where the funds are managed, locations of work, and fund type.

Provide a title, the amount of funds, and provide a description of the purpose of the funds.

Save your report.



Viewing Fiscal Resources Reports

Within the Fiscal Resources navigation menu, fiscal resource reports at the state, county, and individual level can be viewed.

To view your fiscal resources reports, select View My Fiscal Resources.

To view state or county fiscal resources reports, select View State/County Fiscal Resources, then refine by year, location of work, objective, and type of funds.

VOLUNTEER ACTIVITY

Volunteers are an essential resource that help Extension fulfil its mission. It is important that volunteer activity is accurately reported. It's recommended that volunteer activity to be reported monthly.

Volunteer Activity Navigational Menu

Under the Volunteer Activity navigation menu county and state volunteer activity can be viewed and individual volunteer activity reports can be created, edited, and viewed.

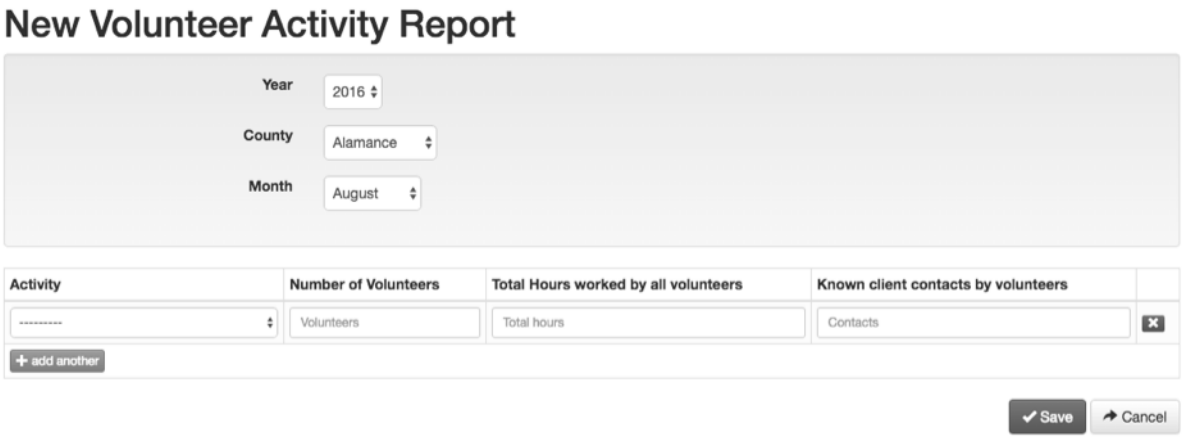
Entering Volunteer Activity Information in ERS

To enter volunteer activity, select Create Volunteer Activity Report from the Volunteer Activity navigational menu.

Select the year, county, and month.

Select an activity type, then enter the number of volunteers, total hours worked by all volunteers, and the number of known client contacts by volunteers.

You can add additional activity types by clicking on add another. When finished click on Save.



Note: Known client contacts by volunteers includes face to face contacts and the distribution of newsletters, fact sheets, and pamphlets, but **does not** include estimated mass media or social media contacts.

Viewing Volunteer Activity Reports

Within the Volunteer Activity navigation menu, volunteer activity reports can be viewed at the state, county, and individual level.

To view your volunteer activity reports, select View My Volunteer Activity Reports. You can refine your list by selecting the year and month of data you want to view. Click on a report to view, edit, or delete.

To view state or county volunteer activity reports, select View State/County Volunteer Activity Reports, then refine by year, county, employee, and month.

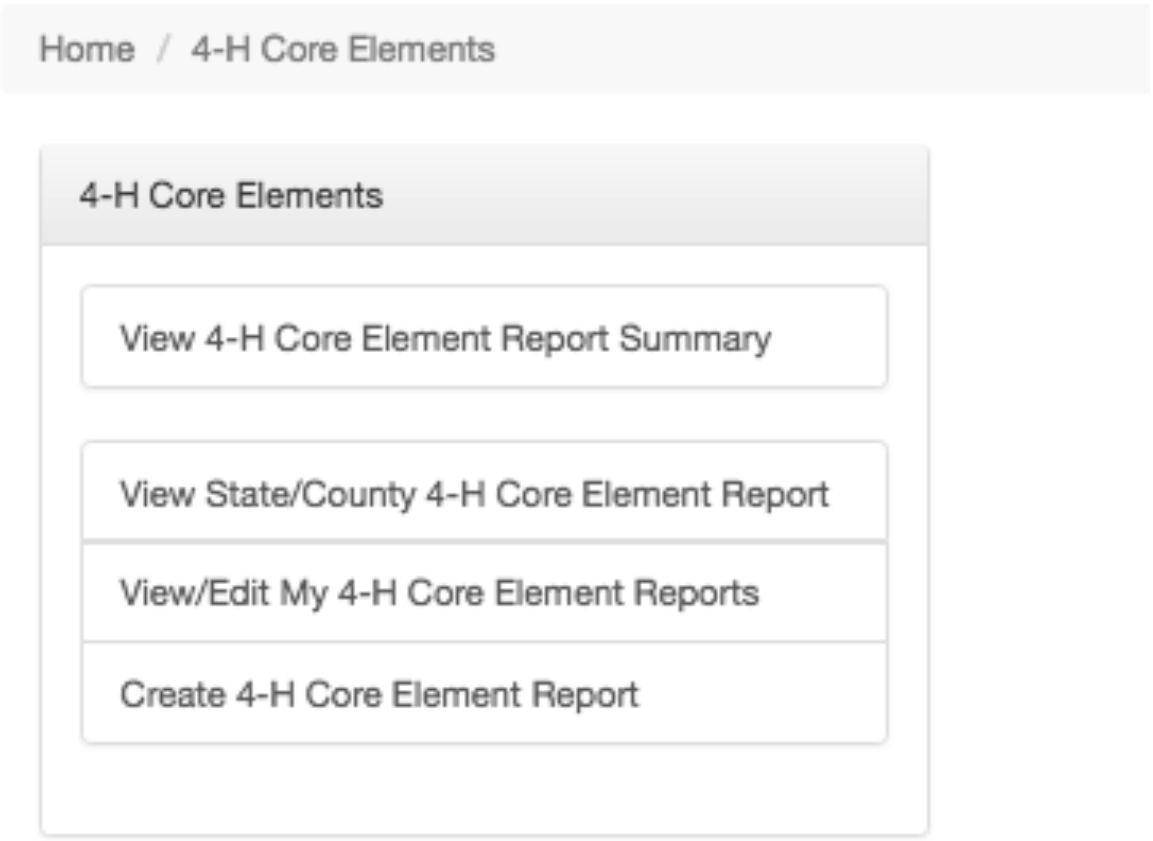
To view a summary of number of volunteers, total hours worked, client contacts, and dollar value, select View Volunteer Activity Summary and refine by year, county, employee, month, and institution.

4-H CORE ELEMENTS

4-H Core Elements Reports collect information on the number of youth involved in a variety of community based youth education programs, 4-H clubs and camps, and partnership and resource development activities. Only annual unduplicated counts should be reported in the 4-H Core Elements Report.

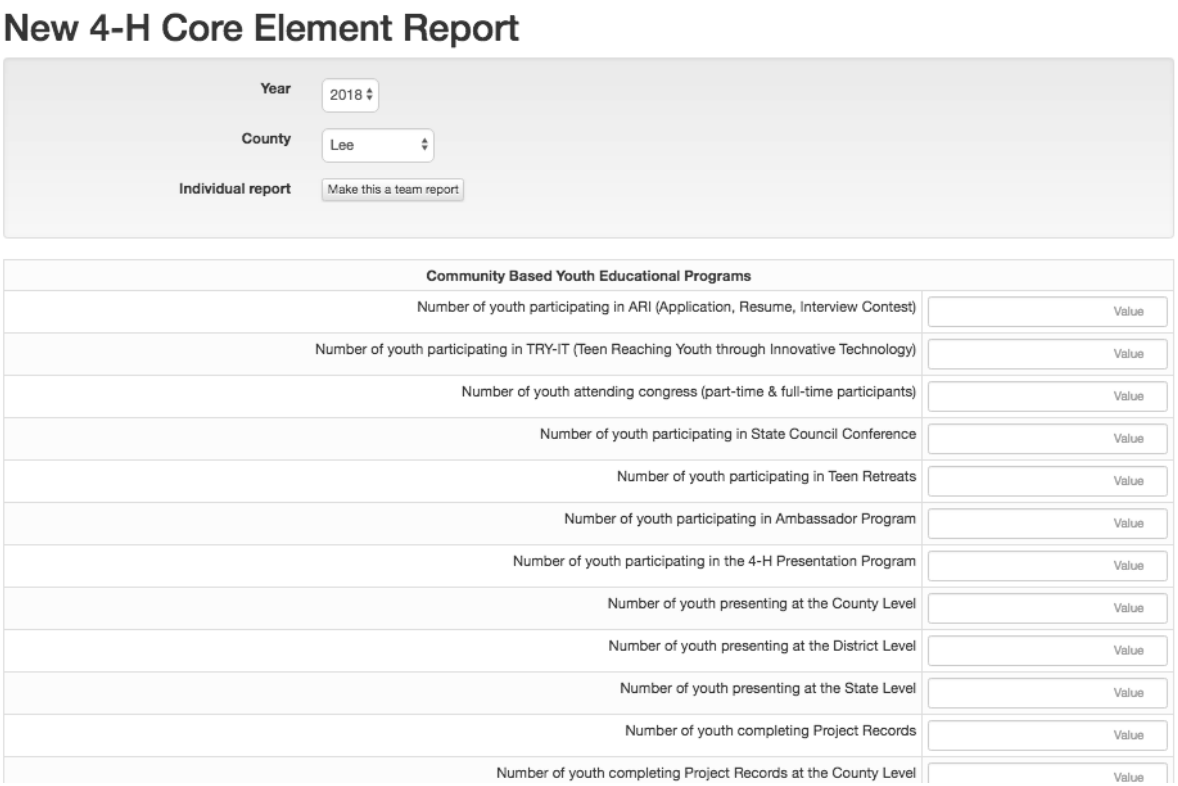
4-H Core Elements Navigational Menu

Under the 4-H Core Elements navigation menu county and state 4-H core element reports can be viewed and individual 4-H core element reports can be viewed, created, and edited.



Entering 4-H Core Elements Information in ERS

To enter information about 4-H core activities, select Create 4-H Core Element Report from the 4-H Core Elements navigational menu. The year and county are prepopulated but can be changed if needed. You can make this a team report by clicking on Make this a Team Report and selecting a team or listing team members. Enter the value for each measure being reported. When finished click on Save.



Viewing 4-H Core Element Reports

Within the 4-H Core Elements navigation menu, you are able to view 4-H core element reports at the state, county, and individual level.

To view your 4-H core element reports, select View/Edit My 4-H Core Element Reports.

To view state or county 4-H Core Element Reports, select View State/County 4-H Core Element Report, then refine by year, county, and employee.

To view a summary report, select View 4-H Core Element Report Summary and refine by year, county, employee, and institution.