# NC COOPERATIVE EXTENSION

1 One Stop Shop

Extension Reporting System (ERS) User Guide – 2023

The *Extension Reporting System (ERS)* is a web-based activity reporting system used to collect and report information about the accomplishments of extension educators and the clients they serve. The data entered in ERS is used to meet Extension's state and federal reporting requirements as well as to develop materials to share with our stakeholders to demonstrate Extension's impact.

ERS is composed of 6 reporting modules:

1. Program Activities
2. Outcomes & Impacts
3. Success Stories
4. Civil Rights Reports
5. Fiscal Resources
6. Volunteer Activity
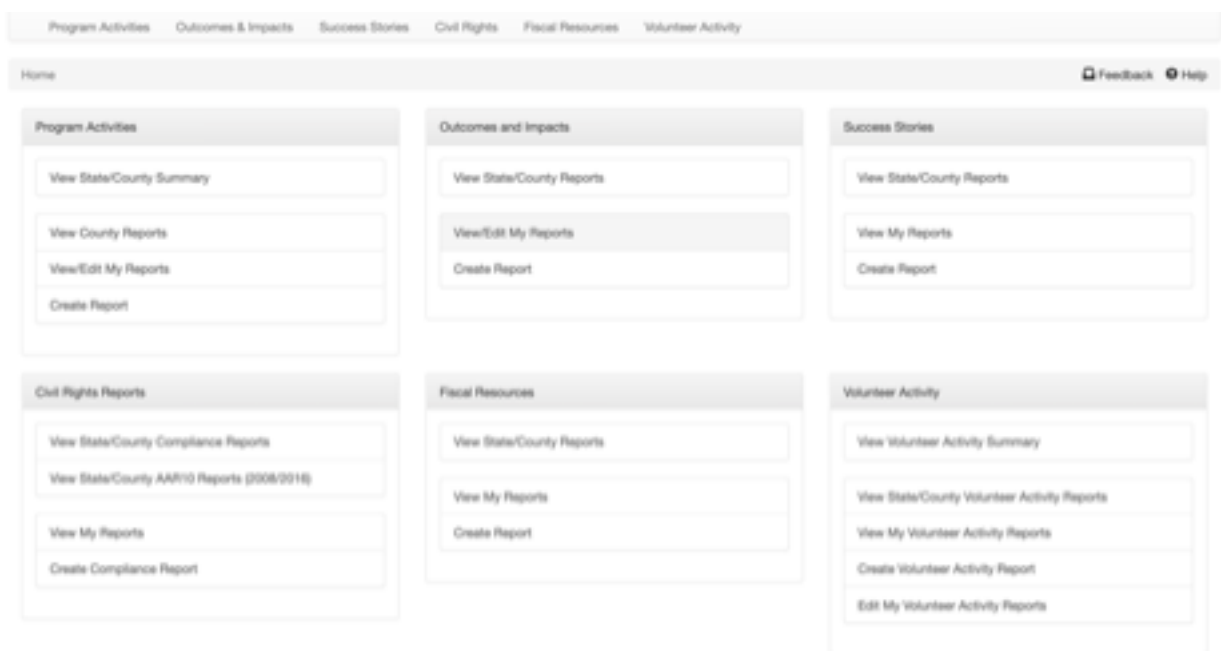
Accessing Help

Within each of the modules of the ERS Application HELP documentation can be accessed by clicking on ⊘ Help at the top of the page. By clicking on the 🖵 Feedback button, messages can be sent directly to the EIT Help Desk from within the ERS Application with requests for help troubleshooting problems, questions about how to use the system, or suggestions for system improvements. You can find more information about Extension reporting and using the ERS system by visiting the [Evaluation & Accountability ERS webpage](#).

Entering data into ERS should be a *routine part of your job*. It's very important that ERS data is entered on a timely basis to ensure that the data reported by Extension is accurate. When Extension is asked to provide ad hoc reports, we are limited to reporting the data already entered in ERS. The *timeliness, accuracy and comprehensiveness* of the information that is entered into ERS will be evaluated as part of your annual performance appraisal and as part of any title promotion or position promotion you apply for. ERS is the **Official Reporting System** for NC Cooperative Extension County Extension data.

Data on program activities and volunteer activities should be entered as they occur. To meet the minimum standard of reporting expectations, *program and volunteer activities* need to be entered **at least monthly**. *Civil rights* data for all advisory leadership groups, clubs, and other organized groups need to be entered by **March 31st** of each year and updated as necessary. *Outcomes and Impacts, Success Stories and Fiscal Resources* should be entered as available but must be entered **at least twice a year**, by June 30th for performance review purposes and December 31st for reporting purposes.

The ERS system operates on a calendar year basis and data must be entered into ERS prior to the end-of-year lockout. Any data not entered prior to this date will not be included in the annual comprehensive statewide data file. All success stories must be approved prior to lockout, any unapproved stories will be purged from the system. **The annual lockout and rollover for ERS will be in early January. Lockout date will be announced annually**.

The ERS Application is *mobile friendly* and designed so that all modules can be accessed, and data entered on a mobile phone or other mobile device.

The *Program Activities* module is used to report planned educational activities, facilitation, events, and outreach delivered to your Extension customers. Program activities are characterized as having the intention to convey research based educational information or provide a product or service. Program activities are restricted to events, products or services conducted for **our external customers/ members of the general population** and do not include training or other professional development activities provided to other Extension employees or degree enrolled NC State or NC A&T students (internally focused activities should be reported in your Employee Professional Development Record - XPD).

The Program Activities Module allows Extension to document the types of activities being conducted and the number of interactions between Extension educators and members of the public in support of Extension objectives. The module also allows Extension to demonstrate that service is being provided regardless of race, ethnicity, and gender such that Extension follows civil rights rules and regulations.

Program Activities Navigation Menu

The *Program Activities* navigation menu allows you to View the State/County Summary Report, View County Reports, View/Edit Your Reports, and Create Reports.
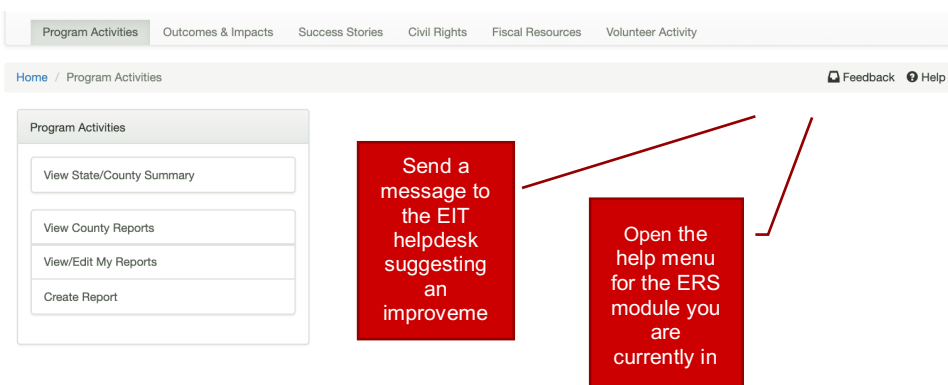
Creating a Program Activity Report

There is the performance expectation that program activities are reported ***at least monthly*** or immediately after they occur.   *MOBILE TIP: ERS is designed to be mobile friendly. While at an event you can log into ERS and directly enter a Program Activity Report.*

To create a ***Program Activity Report***, select Create Report from the Program Activities navigational menu.

Select the appropriate Activity Report Type from the dropdown list, then click Proceed. If you are unsure of the correct report type, review the report type descriptions and examples before making your selection.

Program Activity Types

The selected program activity type will determine the data fields subsequently displayed based on data collection requirements.

Group Event - Organized Extension events presented by Extension employees, invited experts in the field, or trained volunteers aimed at imparting information to help the participants attain a required level of knowledge or skill and lead to behavior change or adoption of a practice.

Core Elements: group educational events; transfer of research based educational content to participants; based on curricula, lesson plan, or lesson outline; identified learning objectives; sponsored, organized, and marketed by Extension; preregistration and participant check-in *or* onsite signup; collection of self-reported participant demographic data; collection of evaluation data. Events may occur in-person or as a live virtual event. Events may be single or multi-session in duration.

Examples Include: classes, trainings, workshops, presentations at conferences or meetings, camps, clubs, afterschool programs, tours, field trips, demonstrations, field days, synchronous webinars

Self-Directed - Planned, self-paced activities or experiences developed or assembled for the purpose of independent study.

Core Elements: individual educational activities; transfer of research based educational content to participants; based on curricula, lesson plan, or lesson outline; identified learning objectives; sponsored, organized, and marketed by Extension; registration and documentation of completion; collection of participant demographic data; collection of evaluation data. Participants may pick up physical "kits" or may sign up for virtual asynchronous learning experiences.

Examples Include: 4-H kits; 4-H projects; self-paced online learning modules or courses; pre-recorded webinars; pre-recorded video series; online self-directed activities or competitions. Note: these activity examples may fall into another activity type if the core elements are not met.

Technical Assistance - One-on-one or small group direct client consultations made by Extension employees or trained volunteers in response to a request or known need of an Extension client. Research based information is shared with the client to answer client questions, diagnose issues, help solve client problems, or deliver substantive educational information.

Core Elements: collection of participant demographic data; May be a one-time event or may require multiple follow-up visits. Technical Assistance may include sampling, testing, or other techniques and may include coordinating the assistance of an Area Specialized Agent or an Extension Specialist.

Examples Include: office visits, farm visits, home visits, site visits, livestock project visits, virtual visits; water test kits, soil test kits, radon kits. May occur in the office, at the clientele's farm, business, residence, or virtually via video conferencing

Technical Assistance: Electronic - Non face to face client interactions by Extension employees to share research based information to answer client questions, diagnose issues, help solve client problems, or deliver substantive educational information.

Core Elements: demographic data collection is **not** collected; multiple communications with a client on the same topic should be counted as one time used. Do not include one-on-one contacts related to administrative or non-educational matters such as providing registration assistance.

Examples Include: email, phone (voice or text), responding to questions on social media (Facebook, Twitter), message boards, blogs, and other electronic sources of communication

Invited Presentation - Training or speaking engagement provided at the request of an external organization or group. May be a one time request or a standard or ongoing engagement.

Core Elements: non-Extension organized event; logistics of the event including advertising/ marketing, registration, and site selection is planned and coordinated by an external group.

Examples Include: civic club meeting, association meeting/conference, church group meeting, county department meeting, task force meeting

Facilitation - **Facilitating meetings** involving stakeholders such as workgroups, boards, and councils may include organizing the meeting or event, guiding conversations, summarizing viewpoints. **Convening groups** by bringing together diverse stakeholders who represent a range of perspectives on a topic to lead collective action, may include calling and planning the meeting, engaging other entities to join in the work, and securing commitment for agreed upon action. **Representing Extension** by attending and participating in meetings or events that build partnerships for effective problem solving and action within and across communities, may include providing subject matter expertise during group discussions and representing Extension on county and community teams, workgroups, boards, councils, commissions etc.

Core Elements: involvement of stakeholders; multiple possible roles; efforts toward collective impact; may or may not be an Extension sponsored meeting

Examples Include: workgroups, EMG/ECA/Cattlemans/Beekeepers monthly board meetings, councils, taskforces, forums, planning teams

News Media – Distribution of research based educational information via traditional news media sources.

Core Elements: content is research based and educational in nature; does **not** include program marketing or event advertising; collect data on overall reach of effort

Examples Include: radio, newspaper, or TV appearances

Digital Marketing - Distribution of information that contains substantive educational content using digital methods.

Core Elements: content is research based and educational in nature; does **not** include program marketing or event advertising; collect analytics on the reach of the effort

Examples Include: social media, webpages, videos, blogs, podcasts, electronic newsletters

Outreach - Mass distribution of information to either a public or targeted audience. Intent is to raise the awareness of and interest in Extension programs and services.

Core Elements: mass distribution of information; collect data on the number of people exposed to information

Examples Include: livestock shows, trade shows, exhibitions, expositions, fairs, festivals, exhibits, demonstrations, contests; mailed newsletters; stand-alone handouts, brochures, materials; staffed displays; food demonstrations; activity booths; "learn-while-you-wait" opportunities. Note: If you have youth participating in livestock shows you would report their participation as part of a group (4-H club) or self-directed (4-H project) activity. If your county hosts a livestock show, you would report the livestock show and number of attendees as an outreach activity.

Program Activity Report Data Fields

The ERS Program Activities Module displays data fields based on the data collection requirements of the activity type that is selected. The following table identifies the data fields that are required for each of the different activity types.

	Group Event	Self-Directed	Technical Assistance	Technical Assistance-Elec	Invited Presentation	Facilitation	News Media	Digital Marketing	Outreach
Title	✓	✓	✓	✓	✓	✓	✓	✓	✓
Description	✓	✓	✓	✓	✓	✓	✓	✓	✓
County	✓	✓	✓	✓	✓	✓	✓	✓	✓
Objective	✓	✓	✓	✓	✓	✓	✓	✓	✓
Program	✓	✓	✓	✓	✓	✓	✓	✓	✓
Audience/Group	✓	✓	✓	✓	✓	✓	✓	✓	✓
Indiv/Team Report	✓	✓	✓	✓	✓	✓	✓	✓	✓
Start Date	✓	✓	✓						
End Date	✓	✓	✓						
Month				✓	✓	✓	✓	✓	✓
Number of times used or sessions	✓	✓	✓	✓	✓	✓	✓	✓	✓
Number of attendees or reach	✓	✓	✓	✓	✓	✓	✓	✓	✓
Number of contact hours	✓				✓				
Certifications	✓	✓			✓				
Demographics – Race, Ethnicity, Sex	✓	✓	✓						
Name of Organization					✓				

Completing the Program Activity Report Fields

Title: Enter the formal name or a descriptive title of your learning event / resource.

* Title

> Title

- *Titles of events* should list the official event, curriculum, or program name such as 4-H Embryology, NC SafePlates, or Pesticide V Training
- If the event had a *registration in Eventbrite or 4-H online* use the same event title that was used in the event registration setup
- *Titles for presentations at meetings* should be the title of the presentation, such as Building your Own Beekeeping Equipment, rather than the name of the group or meeting so don't use Beekeepers Association Meeting as the title.
- Use the issue being addressed as the title of *facilitation or meeting participation* activities.
- Provide a brief description for the title of *Technical Assistance* such as beef cattle BMP visits or pest identification
- Provide a brief description for *News Media, Digital media, and Outreach* for example, Healthy Eating Video Series or Home Gardening
- **Do not** begin the program name with the year or your county name. Do not use the name of the school or the teacher's name as the title.

Description: Provide a brief description of the activity indicating the key learning objectives. Include any additional notes you may need as a reference such as the name of the group, school or teacher name, topics discussed during technical assistance, farms visited, etc.

* Description

> Description

County: Select the county where the Extension activity was held. This may be different from the county in which you typically work. Use your home county for virtual events. If the activity included multiple counties tag the agents as team members who assisted with the event from the other counties. If the event spanned multiple counties but no other agents assisted, add the CEDs from the other counties as team members.

* County

> ---------

Objective: Select the objective your reported Extension activity is most closely related to. All activities for **youth only audiences** (individuals 18 and under) are reported under 4-H youth development.

Program (optional): Select **all** the Program(s) that are components of the activity being reported. If none apply, leave all boxes unchecked.

Audience or Group: Identify the audience your Extension activities reached. This may be adults, youth, aging adults, families, low-income families, homeowners, schools, farm operators, landscapers, farmworkers, pesticide applicators, beekeepers, etc.

Individual Report: If this is a team report click on make this a team report and either select a pre-existing team or create a new team. Include the team members teaching or directly involved in the event or resource. **Include county, campus-based, and research station-based employees as team members.**

Start Date: Enter the month, day, and year on which the reported activity started.
End Date: Enter the month, day, and year on which the reported activity ended.

<div align="center">

* Start date   mm/dd/yyyy 🗓

* End date   mm/dd/yyyy 🗓

</div>

Month: Enter the month in which the activities were conducted. Rather than start date and end date, some activities will only require you to report the month which they occurred. This allows for monthly reporting of a set of similar activities like Facebook posts.

<div align="center">

* Month   ---------- ⌄

</div>

Number of times used or sessions: Enter the number of times the activity occurred **or** the number of sessions.

<div align="center">

* Number of times used or sessions   [   ]

</div>

For example:
- If you were reporting a single 1-day camp you would enter 1 as the number of sessions
- If a workshop is made up of a series of six two-hour sessions conducted once a week for six weeks with the same people attending each week, you would enter 6 as the number of sessions
- If you repeat the same workshop every month with different people attending each time over six months you would enter 6 as the number of sessions after the six months
- If over the course of a month you made 15 on-farm visits and are reporting them as one set, you would enter 15 as the number of times this type of activity was used
- If you posted 3 educational videos to YouTube or made 3 educational posts on Facebook, you would enter 3 as the number of times used this type of activity was used

Number of attendees or reach: Enter the number of attendees participating in your in-person or virtual learning event **or** the reach of your outreach activities.

<div align="center">

* Number of attendees or reach   [   ]

</div>

- For in-person and virtual events include the number of people who attended the event.
- For multi-day events with the same people attending each day, a person is counted once. The decision to include a person who does not attend all sessions should be made based on if it is required to complete a specified number of hours or percent of classes to receive "credit" for completion.
- When reporting multiple instances of an event with different participants, report the total number of attendees across all sessions.
- Reach for news media can include the number of television viewers, newspaper readers, or radio listeners.
- Reach for digital media can include website page views, Facebook, Instagram and Twitter post views and YouTube video views using metrics provided by each social media site. Do not include views of content that is mostly promotional or not educational.
- Reach can include the number of materials distributed at public events and the number of electronic and print newsletters, factsheets, brochures, and other educational publications distributed.

Number of contact hours: Report the number of instructional contact hours provided. Reported contact hours are not additive or based on the number of people in attendance – think of it as the number of hours of instruction delivered; for example, if 10 people attended a two-hour conference, the number of hours reported is 2.

* Number of contact hours [   ]

- If an event occurs over the course of multiple days with the same participants, report the total contact hours for the event. For example, if participants attend a 2-hour class for 3 weeks the total contact hours is 6.
- If you repeated the same event (single or multiday event) multiple times with different participants only report the number of contact hours once. For example, if you offer a 2 part nutrition education class where each of the 2 sessions is 2 hours long (for a total of 4 contact hours) to 6 different elementary school classrooms, you would report 4 contact hours.
- Report only the instructional hours associated with an event. For example, if you take a group on a tour from 8am-5pm that includes a 2-hour drive to the location, a 2-hour drive back, and a 1-hour lunch break - 4 contact hours should be reported. OR if you are taking youth to camp, you do not report the time sleeping or time you are not actively supervising their activities.

Certification: If the activity includes a certification upon completion, select the certification from the dropdown list

Certification [---------- ⌄]

✓ ----------
Acidified Foods
AED Certified (Adult)
AED Certified (Youth)
Animal Waste Land Applicators
Aquaculture License
Auxin Training
Babysitter Safety Certified (Youth)
Beef Quality Assurance
Beekeeper - Certified
Beekeeper - Journeyman
Boater Safety
Certified Crop Advisor
Certified Plant Professional
Certified Roadside Farm Markets
Certified Safe Farm
Certified Turfgrass Professional
Certified Volunteer Administrator
Child Care
CPR Certified (Adult)
CPR Certified (Youth)
Dairy Goat Production
Environmental Educator
FAMACHA
First Aid Certified (Adult)
First Aid Certified (Youth)
Food Protection Manager (Safe Plates)
Food Safety Handler (ServSafe Handler)
Food Safety Manager (ServSafe Manager)
Food Safety Modernization Act (FSMA)
GAP (Good Agricultural Practices)
GMP (Good Manufacturing Practices)
HAACP (Hazard Analysis And Critical Control Points)
Hospitality
Hunter Safety - Shooting Sports (Youth)
ISA Arborist
Junior Master Gardener
Landscape Industry Certified
Licensed Irrigation Contractor
Licensed Landscape Contractor
Master Gardener Volunteer
Meat Goat Production
Organic Certification
Pesticide Applicator
Pork Quality Assurance
Rain Garden Certification For Landscapers
Registered Forester
Respirator Fit Test
Septic System Installers & Inspectors
Stormwater BMP Inspection And Maintenance
Structural Pest Control
Transport Quality Assurance
Water/Wastewater Operator
Worker Protection Standard (WPS) Trainers
YQCA

Number of Certification Credits: Enter the total number of certification credits earned by participants attending the training. This value should be the number of participants receiving credits x number of credits earned for the training.

Number of New Certifications: Enter the total number of new certifications earned. *Note:* 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 new certification and recertified blocks blank and only report the number of certification credits and number of individuals that received training.

Number of Recertified: Enter the total number of people who earned recertification.

Number Receiving Training: Enter the total number of people that attended the training. *Note:* The number of individuals recertified + 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.

* Number of certification credits	0
* Number of new certifications	0
* Number of recertified	0
* Number receiving training	0

Name of organization: If you are reporting an invited presentation, list the name of the organization/group that invited you to present.

Demographics: Group Events, Self-directed, and Technical Assistance require the collection of self-reported participant demographic data for civil rights compliance purposes. Collection of this data must be voluntarily supplied by participants age 18 or older or the parent, guardian or teacher of participants under age 18. Participants who choose not to self-identify shall be reported in ERS as unidentified. This data shall be collected in a manner that protects the privacy of the participant's data (it may not be collected on sign-in sheets or by any other methods where the information may be viewed by other participants). Use data from Eventbrite registration, electronic, or paper surveys to collect data from participants. Nonresponse is marked as unidentified. The response categories shall not be modified, any other provided responses shall be reported as unidentified. The sum of participants in each of the demographic groups must equal the total number of participants reported previously as the number of attendees.

Race: The categories represent a social-political construct designed for collecting data on the race of broad population groups and are not anthropologically or scientifically based. An individual's response to the question is based upon self-identification. The racial categories for federal statistics and program administrative reporting are defined as follows:

- *American Indian or Alaska Native*. A person having origins in any of the original peoples of North and South America (including Central America), and who maintains tribal affiliation or community attachment.
- *Asian*. A person having origins in any of the original peoples of the Far East, Southeast Asia, or the Indian subcontinent including, for example, Cambodia, China, India, Japan, Korea, Malaysia, Pakistan, the Philippine Islands, Thailand, and Vietnam.
- *Black or African American*. A person having origins in any of the black racial groups of Africa.
- *Native Hawaiian or Other Pacific Islander*. A person having origins in any of the original peoples of Hawaii, Guam, Samoa, or other Pacific Islands.
- *White*. A person having origins in any of the original peoples of Europe, the Middle East, or North Africa.
- *Other.* A person who does not identify with any of the previous race categories.
- *Two or More* Races. A person who reports multiple races.

Total Program Participants	0
* White	0
* Black/African American	0
* Asian	0
* American Indian/Alaskan Native	0
* Native Hawaiian/Pacific Islander	0
* Two or More Selected	0
* Other	0
* Unidentified Race	0

Ethnicity: The categories represent a social-political construct designed for collecting data on the ethnicity of broad population groups and are not anthropologically or scientifically based. An individual's response to the question is based upon self-identification. The ethnicity category for federal statistics and program administrative reporting is defined as follows:

- *Hispanic or Latino*. A person of Cuban, Mexican, Puerto Rican, Cuban, South or Central American, or other Spanish culture or origin, regardless of race. The term, "Spanish origin," can be used in addition to "Hispanic or Latino."
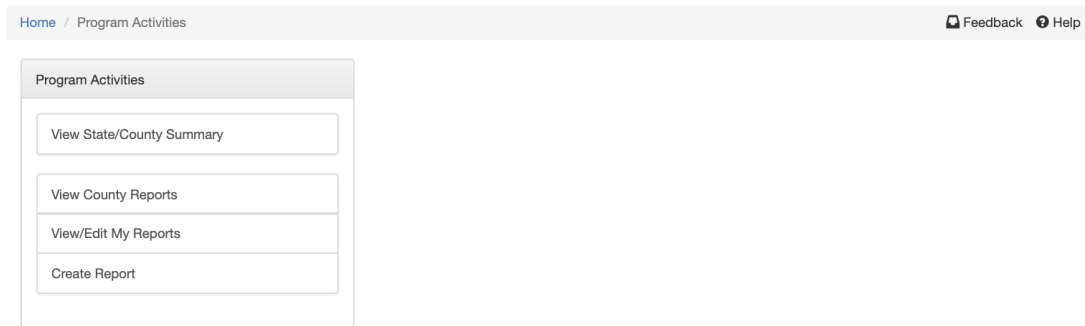
* Hispanic/Latino	0
* Unidentified Ethnicity	0

Sex: The categories represent the individual's biological sex. An individual's response to the question is based upon self-identification.

* Male	0
* Female	0
* Unidentified Sex	0

Viewing Program Activity Reports
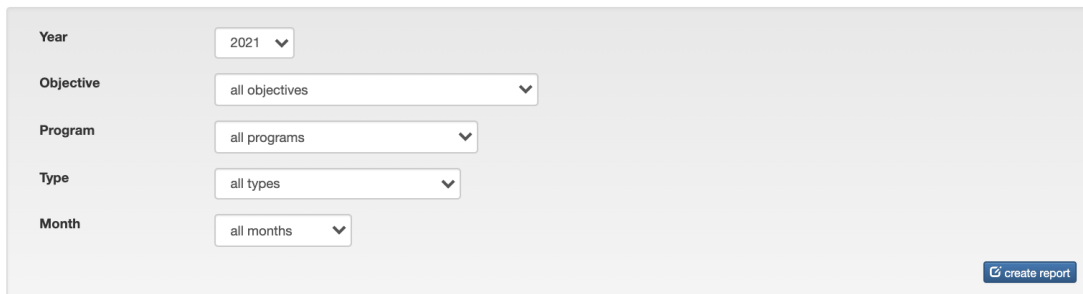
Within the Program Activities navigation menu, you can view Program Activities Reports at the Summary, County, and Individual levels.

Feedback Help

Program Activities

View State/County Summary

View County Reports

View/Edit My Reports

Create Report

To view **Individual Activity Reports** which display a listing of each of your program activity entries for the year, select View/Edit My Reports.
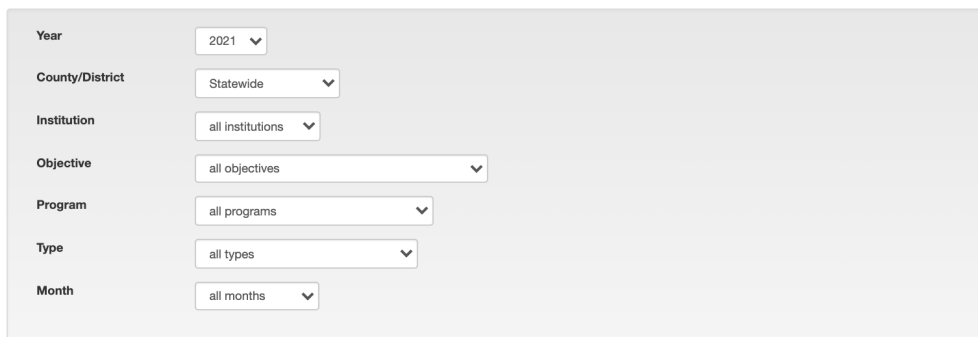
The report can be refined by selecting the desired Year, Objective, Program, Type and Month.

Year	2021
Objective	all objectives
Program	all programs
Type	all types
Month	all months

create report

To view a **State, County, District, or Regional Program Activity Summary** which displays a summary of activities by objective and county, select View State/County Summary.

The report can be refined by selecting the desired Year, County/District/Region, Institution, Objective, Program, Type, and Month.

Year	2021
County/District	Statewide
Institution	all institutions
Objective	all objectives
Program	all programs
Type	all types
Month	all months

To view a **County Report**, which displays a list of all program activities for a selected geography, select View County Reports.

The report can be refined by selecting the desired Year, County/District/Region, Objective, Program, Type, Employee, Institution, and Month.

Year	2021 ⌄
County/District	Statewide ⌄
Objective	all objectives ⌄
Program	all programs ⌄
Type	all types ⌄
Employee	all employees ⌄
Institution	all institutions ⌄
Month	all months ⌄

Outcomes and Impacts reporting allows Extension to track and report on progress toward meeting individual and organizational goals. Outcomes and impacts are a key component in quantifying the impact, value or worth of Extension's work and are used in a variety of reports provided to our funders and other stakeholders.

Outcomes & Impacts Navigation Menu

Under the *Outcomes & Impacts* navigation menu, View State/County Reports and View, Edit or Create Your Individual Reports.

Home / Outcomes & Impacts   🖵 Feedback ❓ Help

Outcomes and Impacts

View State/County Reports

View/Edit My Reports

Create Report

Send a message to the EIT helpdesk suggesting an improvement or requesting assistance

Open the help menu for the ERS module you are currently in
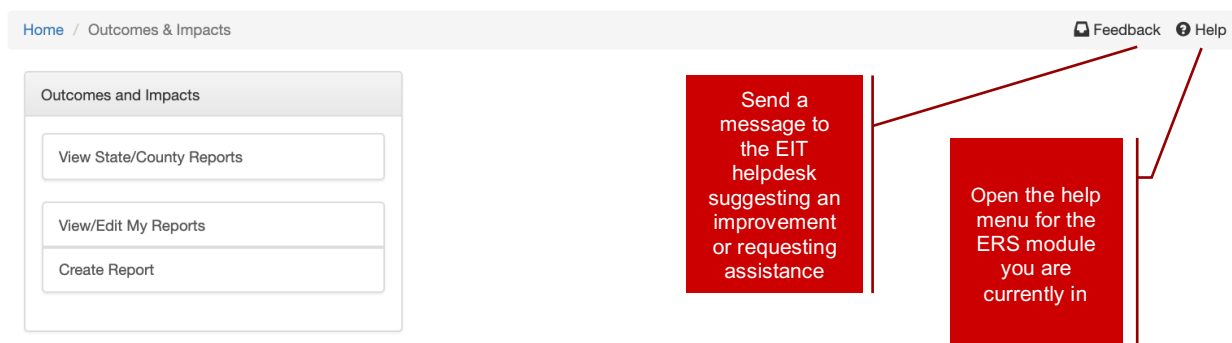
Creating an Outcomes & Impacts Report

There is the performance expectation that the outcomes & impacts report will be completed at least **2x per year** – once prior to performance appraisals and once prior to ERS lockout.
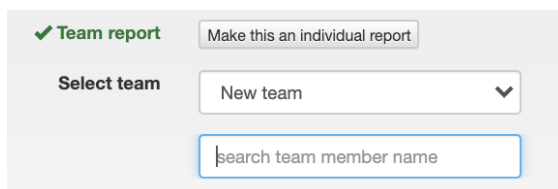
Review the list of indicators to determine where you can report. It is likely that you will report indicators under multiple objectives. *Note:* Indicators related to youth age 18 and under are reported under the 4-H youth development objective regardless of your program area.

To create an **Outcomes & Impacts Report**, select Create Report from the Outcomes & Impacts navigation menu.

Year	2021 ▾
Objective	----- ▾
County	Alamance ▾
Individual report	Make this a team report

❶ Please select an objective.

The Year and County are prepopulated. Select an Objective.

If this is a team outcome click on make this a team report and either select a pre-existing team or create a new team. Include the team members directly involved in achieving the outcome or impact. **Include county, campus-based, and research station-based employees as team members.**
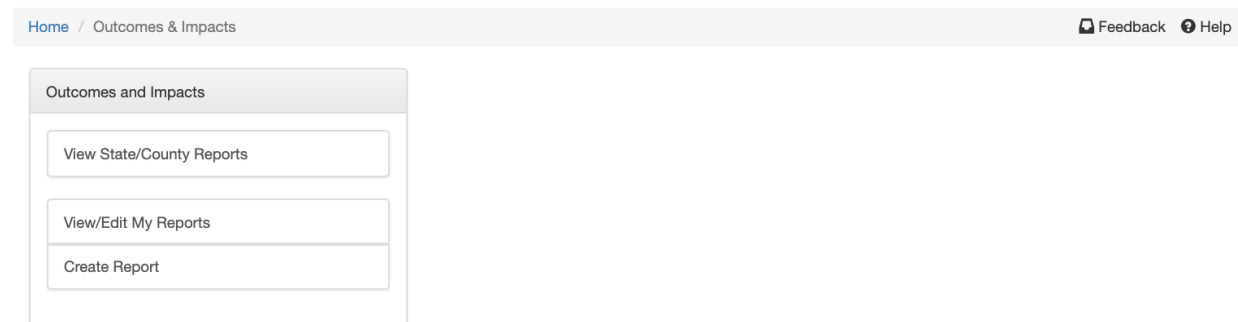

Enter Values for each indicator being reported.

Save the Outcomes & Impacts report **THEN** click on Create a Report to select another objective and report values for additional indicators. Repeat this process until you have reported on all possible indicators. *Note: Most employees will need to look under multiple objectives to locate all possible indicators that can be used to report outcome/impact data.*

To simplify data collection, the 4-H Core Elements report has been combined with the Outcomes & Impacts report. You will notice that some items formerly reported on the core elements report are now listed as indicators; however, after reviewing our data needs, others are no longer being collected.

Viewing Outcomes & Impacts Reports
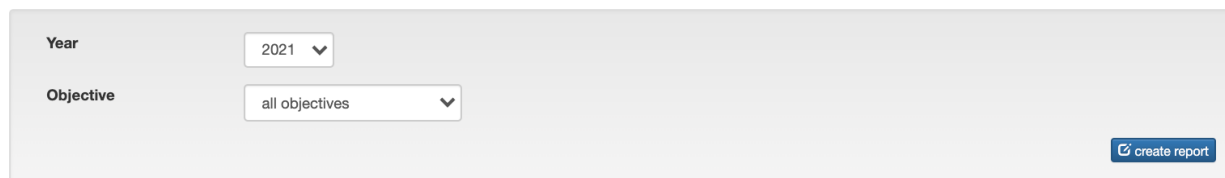
Within the Outcomes & Impacts navigation menu, you can view Outcomes and Impacts Reports at the State/County, and Individual level.

To view an **Individual Outcomes & Impacts Report** which displays a listing of each of your Outcomes & Impacts indicators and their values for the year, select View/Edit My Reports.

The report can be refined by selecting the desired Year and Objective.

To view a **State/County Report** which displays totals for the indicators select View State/County Reports.

The report can be refined by selecting the desired Year, County/District/Region, Employee, Objective, and Institution.

Year	2021 ▾
County	Statewide ▾
Employee	all employees ▾
Objective	all objectives ▾
Institution	all institutions ▾

Success Stories are written to share the positive impact that occurred as a result of Extension's programming. Ideally, success stories should be entered as they occur. The performance expectation is that stories will be entered at least twice per year. The Extension Storytelling website can help guide you in your story development.

Success Stories Navigation Menu

Under the Success Stories navigation menu, you can view state/county and individual success stories and create/edit individual success stories.
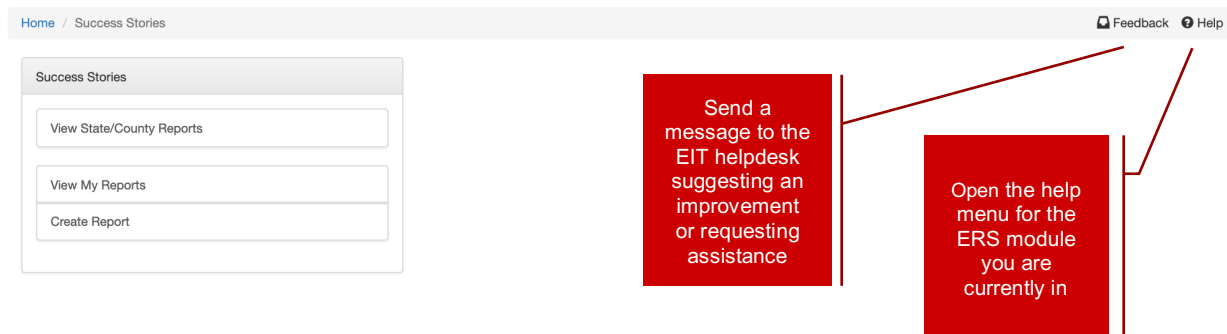
Entering Success Story Information in ERS

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 descriptive, action-oriented Title (like a headline) that conveys the issue being addressed or what's being done to improve a situation. When entering a team success story, one person submits the story and enters the names of all team members by clicking on Make this a Team Report. Include both county based and campus based team members.

Describe the Situation by answering the questions: What was the issue or need that required Extension action? Who was affected by the issue? Include numeric and/or narrative data that shows the need. (Describe why it matters/why the reader should care about the issue.)

Describe the Response to the problem by describing what was done to address the problem or need? What Extension personnel and partners, if any, were involved? How many people were reached through Extension's response? Who were they (describe them)?

Response

> Response
>
> How did Extension respond to the concern, issue, or problem? Who were the partners, if any (e.g., Guilford County Health Department, NC Forestry Service, or Wake County Department of Social Service)? What audience was reached (e.g., Businesses, community organizations, families, farmers, parents, and youth)? How many participants? What communities were reached?

Describe the Results by identifying the impacts of Extension's response (how did we improve the lives of North Carolinians)? Include numeric and/or narrative data that shows your success. Why does this matter? How can your success help other North Carolinians (what are the future implications)?

Results

> Results
>
> What were the program outcomes? Who benefitted from the program? Use numeric and/or narrative data to describe the program outcomes? Answers 'So What' (describes public value).

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.

✔ Save   ← Cancel

Story Approval

Current Status
Draft

Change Status

[⬍]

✔ Save Story Status   ← Your Story List

Viewing Success Story Reports

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

To **View Individual Success Stories**, select View My Reports. Select a *Year*. Stories will be listed and include the objective, county, team members, and the approval status. To view the story, click on the title.

Year	2021 ⌄

⟳ create new story

To **View Success Stories written statewide** or for a particular county select *View State/County Reports*, then refine by the Year, County, Objective, and University.

Year	2021 ⌄
County	all counties ⌄
Objective	all objectives ⌄
University	all universities ⌄

Civil Rights data is collected to ensure the Extension advisory leadership system, 4-H clubs, and Extension identifiable groups are representative of the racial, ethnic and gender make-up of the community. The performance expectation is that data will be entered by **March 31ˢᵗ** of each year and updated as needed.

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 any other identifiable Extension groups that regularly meet 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 Reports navigation menu county and state compliance reports can be viewed, your individual compliance reports can be viewed, and compliance reports can be created.

Entering Compliance Information in ERS

To create a compliance report, click on **Create Compliance Report**.

The Year and County are prepopulated. Enter the Group Name and select the Group Type {Options Include: Advisory Leadership System, 4-H Club, Extension Master Food Volunteer, Extension Community Association, Extension Master Gardener Volunteer, Other}.

US Census American Community Survey (ACS) county population data is prepopulated as the Make-up of Community. Select the button for NCDA Census if the Census of Agriculture, county producer demographic data is a more accurate community make-up. In a few rare instances,

other data sources may be manually entered as the Makeup of Community. *If population data other than the US Census or Census of Agriculture is used, documentation which describes the data source and the justification for use must be included in your county's civil rights file and this record must be maintained for a period of 5 years.*

Enter the Composition of the Group including the number of group members of each Race, Ethnicity, and Sex.

Makeup of Community

White	Black/African American	American Indian/Alaskan Native	Asian	Native Hawaiian/Pacific Islander	Two or More Races	Other Race	Unidentified Race	Total	Hispanic/Latino	Unidentified Ethnicity	Female	Male	Unidentified Sex
0	0	0	0	0	0	0	0	0	0	0	0	0	0

Composition of Group

White	Black/African American	American Indian/Alaskan Native	Asian	Native Hawaiian/Pacific Islander	Two or More Races	Other Race	Unidentified Race	Total	Hispanic/Latino	Unidentified Ethnicity	Female	Male	Unidentified Sex
0	0	0	0	0	0	0	0	0	0	0	0	0	0

In the All reasonable efforts utilized to ensure balanced membership box, 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 additional actions you are currently taking to increase outreach to underrepresented groups to improve membership parity.

When you finish entering all necessary information, Save the group. If you have other groups, repeat the process and create the next compliance report.

All reasonable efforts utilized to ensure balanced membership

All reasonable efforts utilized to ensure balanced membership

[✔ Save] [→ Cancel]

Viewing Civil Rights Reports

Within the Civil Rights navigation menu, Compliance Reports can be viewed at the *State/County level* or the *Individual level*.

To view your Compliance Reports which contain the demographic breakdown of each of your identified groups, an analysis of parity, and your efforts to achieve balanced participation, select **View My Reports**.

Select a Year to view the completed reports, then select the Group you want to view.

A new feature in the ERS Civil Rights Reports is the automated import of Activity Report data into the Civil Rights Module and calculation of parity.

To view State/County Compliance Reports, which provide the demographic breakdown for each identified group statewide, an analysis of parity, and the efforts to achieve balanced participation, select **View State/County Compliance Reports**.

Select the Year, County, Group Type, and Institution to refine the report.

Reading Civil Rights Reports

Civil rights reports are a tool that can provide you with a warning that your program or group participation might not be representative of your larger community. When you see non-compliant it means you need to take a closer look at your data. Some things to consider:

- A program may have overrepresentation of a particular group due historic underrepresentation resulting in Extension's need for targeted efforts to increase participation and increase the groups development of skills previously not developed due to past discrimination.
- Certain programs may have overrepresentation but it is important to ensure that overall programs efforts are balanced and there is not implicit bias preventing people from attending any Extension programs. For example, you may have 2 community garden programs or 4-H clubs in different areas of a county, you wouldn't expect people to drive to a different part of the county to ensure balanced program participation. It is important to ensure both programs are inclusive, they are providing equitable benefits, and there are not barriers to participation.

In the first table, the Compliance Report provides the makeup of the community from either the US Census or the Census of Agriculture. Only the US Census data is used for the auto generated reports pulled from the program activity report data.

The second table provides the number of participants in a program or group. This is followed by the minimum number of participants or group members required in each demographic category to be compliant (80% of the percent makeup in the community population).

Additional information on balanced participation and parity can be found on the civil rights website.

2022 Compliance Report `Non-compliant`

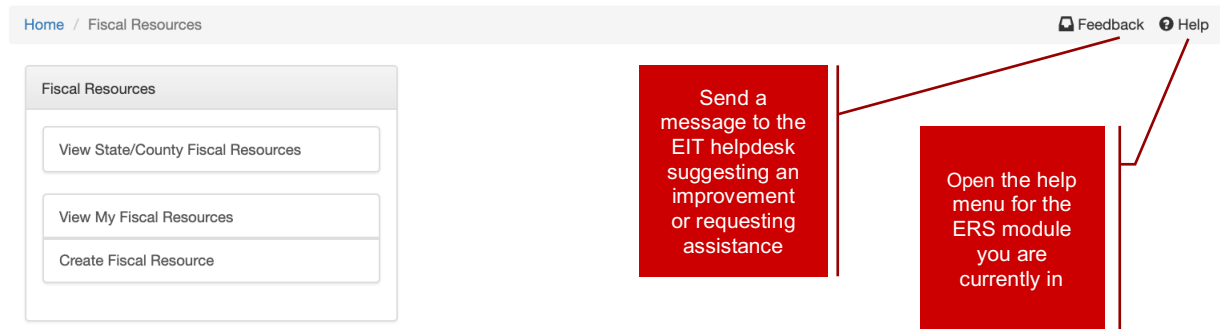| Objective	Group Name	Group Type	Year	County	Employee
	evaluation stars	Other	2022	Alleghany	Weinstein, Meredith

Makeup of Community

White	Black/African American	American Indian/Alaskan Native	Asian	Native Hawaiian/Pacific Islander	Two or More Races	Other Race	Unidentified Race	Hispanic/Latino	Unidentified Ethnicity	Female	Male	Unidentified Sex
10,501	267	42	50	1	58	89	0	1,066	0	5,604	5,404	0
95.39%	2.43%	0.38%	0.45%	0.01%	0.53%	0.81%	0.00%	9.68%	0.00%	50.91%	49.09%	0.00%

Composition of Group

	White	Black/African American	American Indian/Alaskan Native	Asian	Native Hawaiian/Pacific Islander	Two or More Races	Other Race	Unidentified Race	Hispanic/Latino	Unidentified Ethnicity	Female	Male	Unidentified Sex
reported	21	13	4	0	0	0	0	0	4	0	19	19	0
min. compliant	29	1	0	0	0	0	0	0	3	0	15	15	0

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

Fiscal Resources Navigational Menu

Under the Fiscal Resources navigation menu, you can view State/County Fiscal Resource Reports and View or Create individual Reports.

Home / Fiscal Resources

Feedback Help

Fiscal Resources

View State/County Fiscal Resources

View My Fiscal Resources

Create Fiscal Resource

Send a message to the EIT helpdesk suggesting an improvement or requesting assistance

Open the help menu for the ERS module you are currently in

Creating a Fiscal Resources Report

There is a performance expectation that the Fiscal Resources Report will be completed at least **2x per year** – once prior to performance appraisals and once prior to ERS lockout.

To enter information about fiscal resources you have secured to support your program, select Create Report from the Fiscal Resources navigational menu.

For each fiscal resource secured, the current Year will be prepopulated. Select the Objective most related the program the funds/resource will support.

Select a location where the funds are managed. Funds may be managed by NC State, NC A&T, foundations at NC State, foundations at NC A&T, county government, other university, non-profit, financial institution, or other.

Identify the Location/county(ies) where the funds will be used.

Select the Fund Type. Fund types include contracts/grants, user fees, United Way/Foundations, gifts/donations, or in-kind grants/donations.

Provide a Title, the Amount of funds received, and a description of the Purpose of the funds. Then you can Save your report

Fiscal Resource Report

Year	2021
Objective	----------
Funds managed at	----------
Locations of work	
Fund type	----------
Title	Title
Amount	Amount
Purpose	Purpose

✓ Save   ← Cancel

Viewing Fiscal Resources Reports
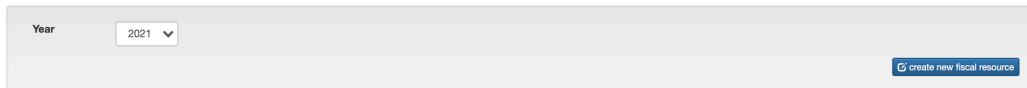
Within the Fiscal Resources navigation menu, you can view State/County and Individual reports.

To view **Individual Fiscal Resources Reports** which displays a list of all your fiscal resources secured select View My Reports.
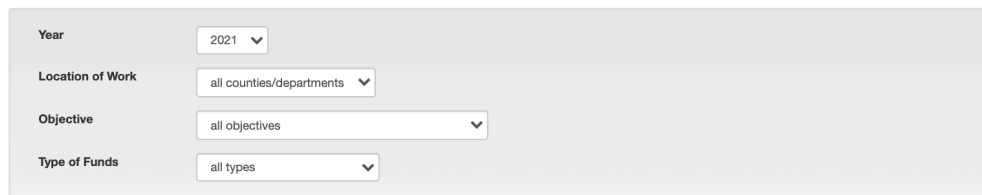
You can change the year to modify the time-period of the fiscal resources displayed.

To view a **State/County Report** which displays a list of fiscal resources secured by all counties or by a selected county, select View State/County Reports.

The report can be refined by selecting the desired Year, Location of Work, Objective, and Type of Funds.

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.
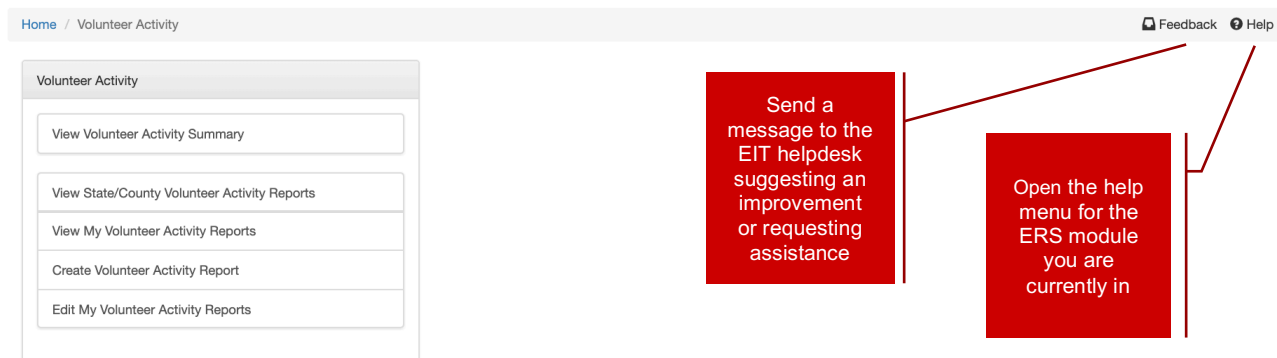
Entering Volunteer Activity Information in ERS

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 might notice there is no longer a Volunteer Activity type for Extension Master Gardener Volunteers. The EMGV activity information is now being auto populated from the EMGV portal. To view your volunteer data run an ERS volunteer activity report. Any errors detected in your imported EMGV data should be corrected in the EMGV portal and ERS will automatically update.

Note: Known client contacts by volunteers can include Extension program activities and information delivered or distributed by volunteers independently or while assisting an Extension employee. Do not include activities related to program marketing.

You can add additional activity types by clicking on Add another. Records can be deleted by clicking on the X.

When finished click on Save.

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.

Year	2021
Month	all months

create report edit my reports

To **view state/county volunteer activity reports** which provide a listing of all individual activity reports entered by Extension employees, select View State/County Volunteer Activity Reports, then refine by Year, County, Employee, and Month.

Year	2021
County	all counties
Employee	all employees
Month	all months

create report edit my reports

To view a **Volunteer Activity Summary** that provides a snapshot of the number of volunteers, total volunteer hours worked, number of client contacts, and dollar value, select View Volunteer Activity Summary and refine by Year, County, Employee, Month, and Institution.

Year	2021
County	all counties
Employee	all employees
Month	all months
Institution	all institutions

create report edit my reports