AAB/NREE REPORTING GUIDE 2023-2024 updated 4/28/2024

Guide to the Guide (with section links)

Who, when, what, how, why

- **Who? Educators and outreach associates** enter data. **Extension program coordinators** enter data if they work on applicable activities (e.g. gardens; Master Gardener and Master Naturalist programs) or if requested by their county or unit office.
  - Educators in AAB/NREE should follow this guidance. Information is also provided
    https://extension.illinois.edu/pre/reporting-aabnree
  - Coordinators reporting applicable work (e.g. gardens; Master Gardener and Master Naturalist programs) should refer to this guide and information provided at
    https://extension.illinois.edu/pre/garden-reporting
    https://extension.illinois.edu/pre/master-gardener-programs
    https://extension.illinois.edu/pre/master-naturalist-programs
- **When?** This guide covers activities conducted 10/1/2023-9/30/2024.
  - **Due January 10, 2024:** report on activities conducted 10/1/23-12/31/23.
  - **Due April 10, 2024:** report on activities conducted 1/1/24-3/31/24**.**
  - **Due July 10, 2024:** report on activities conducted 4/1/24-6/30/24.
  - **Due October 10, 2024:** report on activities conducted 7/1/24-9/30/24. **Finalize all activities conducted 10/1/23-9/30/24.**
- **What** to report? These are the key Extension-wide (**) and AAB/NREE (+) reporting needs.
  - **[Direct education](#) activities
  - +[Indirect activities](#)

** [Impact Success Story](). See **[Impact Success story Guide]()**

+[Research projects]() (as they occur, or watch for periodic requests)

+[Expert assistance contacts]() (track and report monthly)

+[Extension-supported gardens]() (Report in early summer. Complete pounds of produce donated in fall.)

**[External collaborations]() (partnerships and coalitions) -- collaborations with a one or more external organization)

[Evaluations]() (as completed)

- **Why?** Activity reporting contributes to AAB/NREE program area success in several ways. They provide **accountability** for our funding. They **document and demonstrate** all the ways AAB/NREE staff work to accomplish program objectives. They can help **identify opportunities** for development. They provide program summary data for **marketing** purposes.

- **Questions?**
  - Karen Winter-Nelson ([kwinter@illinois.edu]())
  - Beth Welbes ([echamb@illinois.edu]())
  - Master Gardener reporting and evaluation: Candice Anderson ([mille116@illinois.edu]())
  - Master Naturalist reporting and evaluation: Duane Friend ([friend@illinois.edu]())

Quick Guide to Reporting and Evaluation

Direct education activities—delivery of a curriculum with interaction

What is direct education?

1. Delivery of a planned educational curriculum, with possibility of audience interaction
2. Include webinars.
3. Include asynchronous curricular modules (e.g. Moodle, kits) if they have some evidence of completion (e.g. post quiz; progress tracker; kit evaluation survey).
4. Do not include meetings without educational content.
5. Do not include education delivered to Extension staff.

How is direct education reported?

6. Reported under PEARS/Track/Program Activities
7. See [https://extension.illinois.edu/pre/reporting]()
8. For guidance on which activities should be reported as a single program activity, and which should be separate ones, refer to the [AAB/NREE PROGRAM ACTIVITY ENTRY GUIDE]() below for additional guidance on entering information for different types of educational activities
9. When naming the activity, use the [AAB/NREE NAMING GUIDE]() below and [https://go.illinois.edu/AAB-NREE-naming](). For other activities, you may also choose to use your own consistent naming to group activities by topic or initiative.
10. AAB/NREE entries now collect additional data on theme, topic, and program on the custom data screen. See the [Quick reference guide—Custom Data]() for orientation to custom data.

Indirect activities—educational/informational resources without audience interaction

What are indirect activities?

1. Educational/informational resources without the possibility of audience interaction or feedback
2. Typical activities include articles, fact sheets, videos, podcasts, blog posts, radio and tv appearances, etc.

How are indirect activities reported?

1. Reported under PEARS/Track/Indirect Activities
2. Organize indirect activity entries by channel or by specific content
3. Make separate entries for each collaborator group, even if series is the same. Can name activity exactly the same but list different channels and collaborators, say for podcast that has different guest each time.
4. Start and end dates: for multi-channel series, can use program year start and end dates.
5. Always create a separate intervention channel entry for each output, e.g. each article, blog post, podcast, video. The intervention channel entry is the main level of detail we are aggregating to count output.
6. Use the intervention channel description field to provide info. Include title/topic and date of release.
7. "Reach" numbers are understood to be estimates often. Enter 0 if unavailable. Don't spend a lot of time searching for these numbers.

Impact Success Stories

1. Reporting is under PEARS/Track/Success Stories
2. Educators should report, or contribute to, at least one success story by 11/30/24.
3. See **Impact Success Story Guide** for more information

Research projects

What are research projects?

1. Activities related to research and knowledge building, including:
   - demonstrations and trials
   - structured scouting
   - research projects where Extension is providing an outreach component
   - other activities that are designed to generate information or greater understanding for Extension and its audiences, such as Extension Collaboration grants

How are research projects reported?

1. Make a **separate entry** for each research project.
2. Report using the Research Activities Entry form.
   - Be sure to enter start date and end date in dd/mm/yyyy format.
3. Update record as needed, e.g. when project has results, or if end date changes, in the Research Activities Spreadsheet. Request link to spreadsheet.

Expert assistance contacts

What is expert assistance?

1. Subject matter information/recommendations typically provided by educators or specialists in response to a request via email, phone, face to face, text, web form, etc.
2. Do not include logistical exchanges or contacts that did not involve a question.
3. Do not include questions asked as part of a direct education Q&A.

How is expert assistance reported?

1. Report under PEARS/Track/Direct Contacts
2. Keep track of subject matter information requests via email, phone, and face to face for each month.

Extension-supported gardens

What are Extension-supported gardens?
1. Gardens that are active and that received support from Extension staff or volunteers.
2. Support may include technical assistance, planning, plant support, educational programming, etc.

How are gardens reported?
1. Gardens are reported in the Extension Garden Database. Garden records are updated annually.
2. See https://extension.illinois.edu/pre/garden-reporting for the most current information on garden reporting, including due dates for garden reporting.
3. Consult the Garden Data System to see current records.
    a. Gardens with continuing support from Extension ➜ UPDATE garden record.
    b. Gardens with discontinued support ➜ UPDATE garden status and provide brief explanation.
    c. New gardens and gardens not previously in our system that are active and Extension-supported ➜ ADD a garden. Request site if needed using this link: uie-inepdocs@illinois.edu (flags new site for garden database manager to add).
4. Direct education programs held at the garden are reported in PEARS, as usual.

External collaborations with single partner organization

1. See the External Collaborations Quick Guide
2. https://extension.illinois.edu/pre/reporting
3. Report joint work with a single external partner on an initiative or goal
4. Report in PEARS/Track/Partnerships
5. List all internal Extension collaborators in the collaborators section
6. The SITE field, which includes an organization name as well as address, is the primary unit of analysis. Request a new site at uie-inepdocs@illinois.edu; Subject: New PEARS Site. Include organization name and address. You do NOT need to complete the evaluations page.
7. Tracking of meetings is also optional; this data is not used at the state level.
8. You do NOT need to mark as complete.

External collaborations with two or more partner organizations

1. See the Coalitions Quick Guide (available at https://extension.illinois.edu/pre/reporting
2. Report joint work involving two or more external partner on an initiative or goal
3. Report in PEARS/Track/Coalitions
4. List all internal Extension collaborators in the collaborators section.
5. Add each external organization as a "Member."
6. Be sure to list each member SITE, which includes organization name and address, as this field is our primary unit of analysis. Request a new site if needed at uie-inepdocs@illinois.edu. Include organization name and address.
7. You do NOT need to complete the evaluations page.
8. Tracking of meetings is also optional; this data is not used at the state level.
9. You do NOT need to mark as complete.

Evaluations

See https://extension.illinois.edu/pre/evaluation for evaluation information and resources.

1. **Plan your evaluation. Evaluate with purpose, considering priorities, goals, and feasibility.**
   a. *Setting evaluation priorities.* Programs are a priority for evaluation where the information is potentially most useful. Types of programs that most warrant investing in evaluation may include:
      • Same outreach delivered repeatedly (higher collective number of participants)
      • Collaboration across units (work together to develop evaluation tools)
      • Major programs—ones where significant time/effort are invested
      • Programs with potential for scaling up
      • Best potential for demonstrating impact (e.g. multi-session, focus on action or skills)
      • Where "multipliers" can demonstrate potential impact beyond participant (benefits beyond participants in a way you can quantify)
   b. *Evaluation goals.* Typical evaluation goals include (1) assessing effectiveness and impact outcomes (e.g. knowledge change; how the information will be used or has been used; and participant value); (2) program development, including getting feedback on program content and delivery and identifying future topics; (3) understanding participants, such as their role, demographics, practices, and how to connect with them.

2. *Develop your evaluation.* We have many resources available for end-of-program evaluations. Get access to all of them at https://extension.illinois.edu/pre/evaluation
      • **Standard survey**. Generic short standard survey. Centrally managed with program results available via results dashboard.
      • **Customizable standard survey.** Short standard survey that can be customized to evaluate knowledge change on specific topics and intent to take action on specific actions.
      • **Survey question library.** Build your own survey by using this repository of questions available in Qualtrics and in Word.

3. *Think about your evaluation results.* If you collect the data, do spend some time looking at the information provided and think about possible ways it can be applied in future programs.

4. *Share your evaluation results and data.*
   a. Add Karen Winter-Nelson as a collaborator with data access to Qualtrics surveys.
   b. For non-Qualtrics data, Upload evaluation data to Box, including (1) copy of instrument; (2) any evaluation summary you've written up; (3) access to evaluation data at the record level (via excel or qualtrics).
   c. Uploading evaluations to PEARS program activity is optional. It is not required for state purposes, but you might find it useful to keep results with the program record.
   d. Consider writing an Impact Success Story using any outcome data you've gathered. Evaluation data is most useful when its presentation explains the program and presents what has been learned from the evaluation.

AAB/NREE Reporting Procedures—Checklists

1. **Educators:** see Am I Done? Self-review of annual reporting for Educators
2. **Master Gardener coordinators/Master Naturalist coordinators** (EPCs or educators): see Am I Done? Self-review of annual reporting for MG/MN coordinators.

AAB/NREE Program Activity Entry Guide

1. CLASS SERIES of more than one session with a consistent audience organized by Extension (e.g. Master Gardener, Annie's Project)
    a. Organizer enter as single program activity
    b. Enter all presenters/delivery people from Extension in the collaborator section
    c. List each session, including any delivered remotely via webinar
    d. Presenters do not enter individual session as separate program activity
    e. Naming: series name/city (e.g. Annie's Project/Champaign)
    f. If a single session has extra attendees not part of full series, enter a separate program activity for the session and list the number of session-only participants (Series name/Extra/topic)
2. SERIES of more than one session that audience can participate in "a la carte", i.e. audience will differ (e.g. Four seasons gardening)
    a. Each presenter enters their session as separate program activity
    b. Naming: Series name/session topic (e.g. Four seasons gardening/vegetable gardening)
    c. Evaluation: use consistent evaluation instrument, with items within questions customized to session topic
    d. Demographics: If single registration form used for series, request registration report from IT (or work with Karen to obtain) to get demographics for session-registrants. Use proportionate demographics if attendance >30% of registrants. OR see WEBINAR demographics guidance for (8) below.
3. CONFERENCE or WORKSHOP organized by Extension with generally consistent attendance—participants mostly attend all sessions (e.g. Field Days; Crop Management Conference)
    a. Organizer enter as program activity
    b. Enter all presenters/delivery people from Extension in the collaborator section
    c. List each session
    d. Presenters do not enter program activity for their session
    e. Evaluation: generally single evaluation with questions covering session content
4. CONFERENCE or WORKSHOP with "a la carte" attendance (e.g. some Saturday Gardening Days)
    a. Organizer enter event as program activity
    b. List all Extension presenters/delivery people in the collaborator section
    c. List sessions/agenda in notes section, not as separate sessions
5. CONFERENCE, WORKSHOP, or SERIES organized outside of Extension (e.g Indigenous Plant Symposium)
    a. Each presenter enters their session as separate program activity
    b. Naming: conference-workshop-series name/session topic (e.g. Indigenous Plant Symposium/Wetlands)
    c. Evaluation: ask organizer for evaluation results
6. PRESENTATIONS delivered IN-PERSON or by WEBINAR to SPECIFIC SITES as part of a CLASS SERIES (e.g., presenter on specific topic within Master Gardener volunteer training)
    a. Not reported separately—will be reported by coordinator of local series
7. STATIONS/TABLES at an event organized either by Extension or outside organization, where participants choose which stations/tables to visit (e.g. booth/table at Chicago Garden Show)
    a. Each presenter/delivery person enters their station separately (if multiple people at one station, only enter once)

      b.   Enter the entire time you are there as a single session.

      c.   IN the notes section, describe the typical length of delivery to each group.

      d.   For number of participants, estimate the number of people experiencing your delivery, which may differ from total # of participants at the event.

8. WEBINARS: PRESENTATIONS delivered by WEBINAR at EXTENSION OFFICES or similar site, and not part of a "class series" such as Master Gardener volunteer core training.

      a.   Local site organizer enters as Program Activity

      b.   Organizer lists presenter/delivery person as collaborator

      c.   If session is also available to individuals outside of unit offices, presenter also creates a program activity. Number of participants should omit unit-based participants.

      d.   Naming: Activity name—location. (Presenter: Activity name—webinar) (e.g.

9. WEBINARS: PRESENTATIONS delivered by WEBINAR with offsite (anywhere) availability

      a.   Presenter or session organizer enters as program activity.

      b.   List presenters/organizers as collaborators

      c.   # of participants: (1) Preferred: Use meeting report to get # of unique visitors; (2) Alternate: use highest number of attendees viewing at a time during presentation

      d.   Demographics: use proportionate registration data (if attendance rate of registrations >50%, see worksheet) OR Consider using in-webinar polls on demographic information for actual attendees.

Entry and naming summaries

Program-Specific Naming and Issue Guide

Use the online AAB-NREE Program Activity Naming Guide at https://go.illinois.edu/AAB-NREE-naming.

General Program Activity Entry Guidelines

Type of Program Activity	PEARS Program Activity Entry--Naming Guide	Program Activity Naming Example	Who enters/notes
SERIES of more than one session with a consistent audience organized by Extension	Series name/location (if more than one)	Master Gardener core training/South Cook	Site series organizer enters program activity and list all delivery people/presenters in the collaborator section. Presenters do NOT enter their individual sessions.
SERIES of more than one session that audience can participate in "a la carte", i.e. audience will differ	Series name/topic	Small Farms Webinar Series/	Individual presenters for each topic should enter. See below for Webinar notes if applicable.
Conference organized by Extension; attendees generally attend all sessions	Conference name/location (if more than one)	Crop Management Conference/Malta	Lead Extension organizer enters program activity. List each Extension presenter as collaborators. List each session. In notes, list specific session topics with presenters.
CONFERENCE, WORKSHOP, or EVENT with "a la carte" attendance at sessions	Conference name, following guide below	Gardening Day/Gardeners Big Day	Lead Extension organizer enters program activity. List each Extension presenter as collaborator. In notes, list specific session topics with presenters.
CONFERENCE, WORKSHOP, or SERIES organized outside of Extension	Conference name/session/topic	Illinois Indigenous Plants Symposium/session/What's in a Wetland	Individual presenter enters their session separately

Type of Program Activity	PEARS Program Activity Entry-- Naming Guide	Program Activity Naming Example	Who enters/notes
STATIONS/TABLES at an event organized either by Extension OR by outside organization, where participants choose which stations/tables to visit	Event name/station/topic	Stewardship Days/station/Hydrology	Individual presenter will enter. Enter the entire event time as a single session. In the notes section, describe the typical length of your educational delivery to each group. For # of participants, use the best estimate of those experiencing your table, which may differ from the total # of participants at the event.
WEBINARS: PRESENTATIONS delivered as part of a CLASS SERIES	N/A	N/A	PRESENTER does not enter. SERIES organizer enters session and lists presenter as a collaborator.
WEBINARS: PRESENTATIONS delivered by WEBINAR to SPECIFIC SITES with local hosting, not as part of CLASS SERIES	Presentation name/location	Soil and Water Webinar/Freeport	PRESENTER does not enter. LOCAL SITE organizer enters and lists presenter as a collaborator. Consult presenter for presentation name
WEBINARS: PRESENTATIONS delivered by WEBINAR with universal (e.g. at home) availability, not part of CLASS SERIES	Presentation name/webinar	Soil and Water Webinar/webinar	Presenter enters as a separate program activity. Uses the highest number of attendees on webinar as total participants, subtracting out any sites that hosted local delivery.

AAB/NREE Indirect Activity Entry Examples

Type of Indirect Activity/Examples	Activity name	Channel	Description
SERIES of regular dispatches, e.g. blog, regular TV or radio appearance, newspaper articles	SERIES name or description	Select channel from list	detail on topic and date
Down the Garden Path blog	Down the Garden Path blog	Blog	Early Spring Garden Questions 4/2/18

Type of Indirect Activity/Examples	Activity name	Channel	Description
	(same indirect activity entry)	Blog	Three grassy weeds in the lawn 5/15/18
	(same indirect activity entry)	Blog	Now we need to water 7/18/18
Series of educational tweets	Education Tweet	Social media	Topic: Anaerobic Digestion 5/13/18
First Light radio appearances	First Light Radio segment	Radio interview	Growing interest in community gardens 5/20/18
Hort Garden packet	Hort Garden packet	Articles	Backyard Grapes 4/18/18
MidAmerica Farmer Grower Articles	MidAmerica Farmer Grower	Articles	Watch those first-calf heifers/April 2018
WIFR TV segments	WIFR Green Thumb segments	TV interview	Sunscald on fruits and vegetables 7/11/18
ARTICLE or output that appears several places	Article topic	separate channel entries for each outlet	detail on outlet and date
Thinking about cover crops	Thinking about cover crops	Articles	Article in Chrisman Leader 8/1/18
	(same indirect activity entry)	Articles	Article in Robinson Daily News 8/2/18
ONE TIME activity such as a fact sheet, curriculum development, or special video	Item name	Select channel from list	additional description

AAB/NREE Reporting Procedures—Common Errors and Omissions

Considering the amount of data entered and the complexity of the PEARS system, some mistakes or omissions are to be expected. Here are a few common data entry errors or omissions to be aware of. NOTE that these may not have been errors in the past due to changed guidelines.

Direct education/program activities

1. Not using NAMING GUIDE
2. Multiple people entering same event.
   a. Check GUIDE to see who should enter
   b. Make sure you enter ALL collaborators, including yourself if applicable
3. Not tagging an Action Plan
4. Getting behind on reporting
5. Entering activities other than direct education
   a. Meetings should not be included unless they have planned educational content
   b. Events internal to Extension should not be reported
   c. Report client contact outside of educational programming as expert assistance

Indirect activities

1. Not specifying one or more intervention channels for an activity
2. Not using the intervention channel description field to provide topic info (include topic/title and date of release)

Expert assistance

1. Not keeping track of contacts on an ongoing basis
2. Including non-subject matter requests in count (e.g. time/place/registration info of Extension event)

Gardens

1. Not entering all Extension-supported gardens
2. Not updating record for gardens that are longer supported.

Evaluations

1. Not labeling all scale points on survey with both number and label
2. Not having a clear use for the information you collect
3. Sharing summary data only instead of individual response data
4. Not looking at or thinking about the data once it's collected.