External Collaborations Reporting Guide (last update 7/1/2022)

Definitions

- A *partnership* is a collaboration between Extension and one <u>external </u>agency, business, or organization *with shared purpose for planning, developing or delivering programs, or implementing/adopting policies or practices.* **Enter in PEARS Partnership module**
- A **coalition** is a collaboration between Extension and a group of more than one <u>external </u>agency, business, or organization *with shared purpose for planning, developing or delivering programs, or implementing/adopting policies or practices.* **Enter in PEARS Coalitions module**

What to report

- Partnerships and coalitions active at any point during the reporting year FY22 (Oct 1, 2021 – Sept 30, 2022) **should be entered by Sept 30, 2022.**
- Partnerships and coalitions should be entered only once per reporting year. Coordinate timely entry with Extension collaborators, being sure to tag all collaborators.
- If you have submitted a direct education PEARS program activity and tagged a partner organization as the PEARS site (e.g. K-12 school) during the reporting year, you are **not required** to submit a Partnership entry for this programmatic collaboration.
- Do NOT include collaborations with other Illinois Extension staff or University of Illinois Urbana-Champaign campus people or units.

Examples

Type of collaboration	Is it a partnership or coalition?
Extension collaborates with 1 or more organizations to put on a conference	Yes. Report as Partnership (single external organization) or Coalition (2+ external organizations).
Network of representatives of several organizations meets periodically to share information on a topic.	Yes. Report as Coalition.
Research collaboration with faculty member.	No. Not an external collaboration.
Research collaboration with external organization(s).	Yes. Partnership (single external organization) or Coalition (2+ external organizations).
On-farm research trial at private farm.	Yes – if the private farm is a business. No – if the private farm is not a business.
On-farm research trial at publicly owned farm or land (e.g. community college)	Yes. Report as Partnership (single organization) or Coalition (2+ organizations).
Organization hosts event at their site (not involved in planning or delivery).	No. Not involved in planning or delivery.
Extension Collaboration Grant	No. Not an external collaboration.
Extension delivers a program at a site available to the public (e.g. library, park, etc.).	No – There is no collaboration with shared purpose for planning, developing or delivering programs, or implementing/adopting policies or practices.

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This is a snapshot of the Partnerships module. See detailed instructions on pages 3-4.

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Partnerships Guide FY2022 (*FCS Partnerships entries should follow <u>FCS cheat sheet instructions</u>)

General Information

(Blue highlighted fields are important for reporting)

Partnership Name _____

Program Area(s) / Team(s)

❑ 4-H Youth Development
❑ Administration
❑ Integrated Health Disparities
❑ Community and Economic Development

❑ Cook County Initiative
❑ FCS (use FCS Partnerships cheat sheet)
❑ AAB
❑ NREE

Action Plan _____

Site _____

Unit / County _____

Jurisdiction level

❑ Local ❑ Tribal ❑ State
❑ Multi-state ❑ Federal/National ❑ International

Type of partnership

Industry and business

❑ ag orgs/farmers markets
❑ chefs/culinary institutes
❑ food stores
❑ industry groups
❑ media/advertising
❑ restaurants
❑ worksites
❑ other commercial

Nongovernmental organizations

❑ faith-based
❑ food banks/pantries
❑ foundations/philanthropy
❑ hospitals/health care orgs
❑ human services orgs
❑ labor/workforce dev orgs
❑ senior centers
❑ senior housing ❑ shelter/temp housing

Government

❑ City/reg planning orgs
❑ federal govt/agencies
❑ government programs
❑ Indian/tribal orgs
❑ libraries
❑ local govts/agencies
❑ parks/recreation
❑ public health orgs

❑ public/low income housing orgs
❑ state govts/agencies
❑ transportation groups

Academic institutions

❑ early care and education
❑ schools (including pre-K and K-12)
❑ schools—colleges and universities

Other partners

❑ Community members/individuals
❑ Other partners

Assistance received from partner (check all that apply)

❑ Advertising/marketing
❑ Consulting
❑ Development
❑ Evaluation and tracking
❑ Funding
❑ Human resources/staff time
❑ Program implementation
❑ Materials/publications/supplies
❑ Planning
❑ Recruitment/program outreach
❑ Space (e.g. room for programs)
❑ Tech services (e.g. videographer)
❑ Other

Assistance provided to partner (check all that apply)

❑ Advertising/marketing
❑ Consulting
❑ Development
❑ Evaluation and tracking
❑ Funding
❑ Human resources/staff time
❑ Program implementation
❑ Materials/publications/supplies
❑ Planning
❑ Recruitment/program outreach
❑ Space (e.g. room for programs)
❑ Tech services (e.g. videographer)
❑ Other

Comments

_____

Collaborators

User _____
❑ Contributor ❑ View only ❑ View & edit

User _____
❑ Contributor ❑ View only ❑ View & edit

User _____
❑ Contributor ❑ View only ❑ View & edit

The remaining sections of the partnerships module are optional:

Evaluation
Meetings & Events
Mark as Complete

NOTE: If the optional sections are skipped, do not Mark as Complete.

Instructions for reporting partnerships

- Instructions apply to: 4-H, AAB, CED, IHD, NREE program areas
- Does NOT apply to:
  - FCS Nutrition and Wellness, Consumer Economics, Family Life teams, and EFNEP. Follow FCS specific instructions for reporting partnerships in the FY22 FCS Partnerships Cheat Sheet.
  - SNAP-Ed partnerships. Follow grant-specific instructions available with other SNAP-Ed reporting documentation.

Highlighted fields are important for Extension-wide reporting. Other fields are part of the PEARS interface but are not used for Illinois statewide reporting.

General Information

Partnership name	Usually matches the organization name but sometimes matches a grant or initiative name with a partner.
Program area(s)	Select all program areas contributing to the delivery of the activity.
Action plan	Select the state action plan (issue) that aligns most closely with the primary goals of the partnership.
Site	Search and select the organization as the site. ***If you cannot find a PEARS site for the organization, submit a new site request to uie-inepdocs@illinois.edu.** - **Include in the subject line: "ATTN: New PEARS Site"** - **Include in the body: Organization name, address, city and zip code** **You will be contacted when the site has been added.**
Unit	Select the area that most closely mirrors the geographic scope of the partnership (e.g. county, unit, Illinois).
Jurisdiction	Select as applicable.
Type of Partnership	Select the type of external organization with which you have collaborated.
Assistance received from partner	Select all contributions that the external partner made to the collaboration.
Assistance provided to partner	Select all contributions that Extension made to the collaboration.
In which of the following intervention types is this partner involved during the current reporting year? (choose all that apply)	**Always leave blank.**
Comments	Briefly describe the purpose of the partnership.
File Attachments	**Optional.**

Collaborators

Enter the following information for **each Extension staff member** who contributed to the collaboration. The user who enters the partnership is automatically included as a collaborator. SNAP-Ed partnerships are reported in entries separately from other Extension staff members.

User	Search and select the name of the Extension collaborator. Check the box "Was this user involved in performing the work described in this record?"
Access	If you want the collaborator to be able to edit information in the program activity, then select **View & Edit** (recommended). The default is View Only, which assures that the program activity will display in each collaborator's program activity listing.
What role or contribution did this user offer in this record	**Optional.**

STOP. All remaining fields are optional for 4-H/AAB/NREE/CED/IHD program areas as they may not be applicable to many partnerships. You may complete the partnership to this point and leave it marked as incomplete. You may also choose to complete the remaining fields. Note that if you stop the entry here, you will not "Mark as Complete" (PEARS will give you an error message if you try). The incomplete submitted coalition entry is sufficient, as information submitted in the remaining modules is not used for Extension-wide reporting.

For partnerships submitted by FCS staff including EFNEP (excluding SNAP-Ed), please continue the entry and follow instructions outlined in the FCS FY22 PEARS Partnerships Cheat Sheet

Copying one or more partnerships

Copying a partnership from a previous reporting year can save time rather than creating a new entry from scratch. See PEARS instructions for how to copy one or more partnerships from a previous reporting year at: https://support.pears.io/copy-multiple-partnerships/

Tips

- Change the name. Do not leave the default name that includes (Copied) at the end of the original partnership name.
- Check each screen of the copied partnerships to make sure all information is correct and update as needed for the current reporting year.

This is a snapshot of the Coalitions module. See detailed instructions on pages 6-8.

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Coalitions Module FY2022 (*FCS Coalitions entries should follow <u>FCS cheat sheet instructions</u>)

General Information

(Blue highlighted fields are important for reporting)

Coalition Name _____

Program Area(s) / Team(s)

❒ 4-H Youth Development
❒ Administration
❒ Integrated Health Disparities
❒ Community and Economic Development
❒ Cook County Initiative
❒ FCS (use FCS Coalitions cheat sheet)
❒ AAB
❒ NREE

Action Plan _____

Unit / County _____

Assistance received from coalition (check all that apply)

❒ Advertising/marketing
❒ Consulting
❒ Development
❒ Evaluation and tracking
❒ Funding
❒ Human resources/staff time
❒ Program implementation
❒ Materials/publications/supplies
❒ Planning
❒ Recruitment/program outreach
❒ Space (e.g. room for programs)
❒ Tech services (e.g. videographer)
❒ Other

Assistance provided to coalition (check all that apply)

❒ Advertising/marketing
❒ Consulting
❒ Development
❒ Evaluation and tracking
❒ Funding
❒ Human resources/staff time
❒ Program implementation
❒ Materials/publications/supplies
❒ Planning
❒ Recruitment/program outreach
❒ Space (e.g. room for programs)
❒ Tech services (e.g. videographer)
❒ Other

Comments

Collaborators

User _____ ❒ Contributor ❒ View only ❒ View & edit
User _____ ❒ Contributor ❒ View only ❒ View & edit

Optional Sections

After Coalitions Members section, the remaining sections are optional.

Evaluation • Meetings & Events • Mark as Complete

NOTE: If the optional sections are skipped, do not Mark as Complete.

Coalition Members

Add each member organization represented

+ Add Member

Individual/org name _____

Member's sector of influence

❒ Agriculture
❒ Commercial marketing
❒ Community design
❒ Education
❒ Food industry
❒ Government
❒ Media
❒ Public health/health care
❒ Public safety
❒ Other _____

Type of member

Government

❒ City/reg planning orgs
❒ federal govt/agencies
❒ government programs
❒ Indian/tribal orgs
❒ libraries
❒ local govts/agencies
❒ parks/recreation
❒ public health orgs
❒ public/low income housing orgs
❒ state govts/agencies
❒ transportation groups

Industry and business

❒ ag orgs/farmers markets
❒ chefs/culinary institutes
❒ food stores
❒ industry groups
❒ media/advertising
❒ restaurants
❒ worksites
❒ other commercial

Nongovt organizations

❒ faith-based
❒ food banks/pantries
❒ foundations/philanthropy
❒ hospitals/health care orgs
❒ human services orgs
❒ labor/workforce dev orgs
❒ senior centers
❒ senior housing
❒ shelter/temp housing
❒ other nongovt orgs

Academic institutions

❒ early care and education
❒ schools (including pre-K and K-12)
❒ schools—colleges and universities

Other member types

❒ Community members/individuals
❒ Other partners

Member's primary site or organization

Briefly describe this member's role and any resources they provide to the coalition

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Instructions for reporting coalitions

- Instructions apply to: 4-H, AAB, CED, IHD, NREE program areas
- Does NOT apply to:
  - FCS Nutrition and Wellness, Consumer Economics, Family Life teams, and EFNEP. Follow FCS specific instructions for reporting coalitions in the FY22 FCS Coalitions Cheat Sheet.
  - SNAP-Ed coalitions. Follow grant-specific instructions available with other SNAP-Ed reporting documentation.

Highlighted fields are important for Extension-wide reporting. Other fields are part of the PEARS interface but are not used for Illinois statewide reporting.

General Information

Coalition name	Provide the name of the group or coalition.
Program area(s)	Select all program areas contributing to the delivery of the activity.
Action plan	Select the state action plan (issue) that aligns most closely with the primary goals of the partnership.
Jurisdiction level	Select as applicable.
Unit	Select the area that most closely mirrors the geographic scope of the target population that will most directly benefit from the work of the coalition (e.g. county, unit, Illinois).
Assistance received from this coalition	Select all contributions that the coalition made to the collaboration. Not used in Extension-wide reporting but is a PEARS required field.
Assistance provided to this coalition	Select all contributions that Extension uniquely made to the collaboration. Not used in Extension-wide reporting but is a PEARS required field.
In which of the following intervention types is this coalition involved during the current reporting year? (choose all that apply)	**Always leave blank.**
Comments	Briefly describe the purpose of the coalition.
File Attachments	**Optional.**

Collaborators

Enter the following information for **each Extension staff member** who contributed to the coalition. The user who enters the coalition is automatically included as a collaborator. SNAP-Ed coalitions are reported in entries separately from other Extension staff members.

User	Search and select the name of the Extension collaborator. Check the box "Was this user involved in performing the work described in this record?"
Access	If you want the collaborator to be able to edit information in the program activity, then select **View & Edit** (recommended). The default is View Only, which assures that the program activity will display in each collaborator's program activity listing.
What role or contribution did this user offer in this record	**Optional.**

Coalition Members

Use the [+ Add Member] to enter each unique *member organization* in the coalition or group. The goal is to represent each unique organization, not to represent each individual on the coalition.

Individual or organization name	Enter only an organization name as the purpose of our tracking is to identify partner organizations. DO NOT enter individual names.
Member's sector of influence	Select the organization's sector from the options.
Type of member	Select the type of organization.
Member's primary site or organization	This is how we track unique organizations with whom we collaborate on the coalition so it is VERY IMPORTANT for Extension-wide reporting. For members representing organizations, select the member's primary site/organization. ***If you cannot find a PEARS site for the member's organization, submit a new site request to uie-inepdocs@illinois.edu.** • **Include in the subject line: "ATTN: New PEARS Site"** • **Include in the body: Organization name, address, city and zip code** **You will be contacted when the site has been added.**
Briefly describe this member's role and any resources they provide to this coalition	Not used in Extension-wide reporting but is a PEARS required field. You can enter N/A in order to save the coalition member entry.

STOP. All remaining fields are optional for 4-H/AAB/NREE/CED/IHD program areas as they may not be applicable to many coalitions. You may complete the coalition to this point and leave it marked as incomplete. You may also choose to complete the remaining fields. Note that if you stop the entry here, you will not "Mark as Complete" (PEARS will give you an error message if you try). The incomplete

submitted coalition entry is sufficient, as information submitted in the remaining modules is not used for Extension-wide reporting.

For coalitions submitted by FCS staff including EFNEP (excluding SNAP-Ed), please continue the entry and follow instructions outlined in the FCS FY22 PEARS Coalitions Cheat Sheet

Copying one or more coalitions

Copying a coalition entry from a previous reporting year can save time (especially if you have entered all coalition member organizations) rather than creating a new entry from scratch. See PEARS instructions for how to copy one or more coalitions from a previous reporting year at: https://support.pears.io/copy-multiple-coalitions/

Tips

- Change the name. Do not leave the default name that includes (Copied) at the end of the original coalition name.
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