

Recordkeeping and Reporting Guidelines

The Expanded Food and Nutrition Education Program (EFNEP) is a federally-funded nutrition education program operated in each individual state as part of the Cooperative Extension program outreach of the land-grant universities of that state. Therefore, there are reporting expectations for each of the following: federal government, state government, university, and organization and county. Because reports are used by different entities for different purposes and reported through different systems, a duplication of data entry occurs. Staff members should take this into consideration and organize their work time in such a way as to prevent reporting requirements from interfering with actual program delivery and outreach. As you plan time for reporting, be familiar with how the same information is shared across reports. This will assist you to have an efficient reporting process.

In your initial training, you learned what the various reports are and how to complete each report accurately. In this document, we want to remind you of the purpose of each report.

CALENDARS

Calendars, whether written or electronic, are used to help you organize your work, but also as a communication and verification tool for you, your county office staff and your supervisors. The calendar is your personal tool for documenting program planning including lessons, recordkeeping, reporting, and other related activities. Also, the calendar is your documentation that verifies your daily work and travel. If questions arise regarding your work, your calendar should be the resource that provides the answers. The purpose of the requirements for calendar documentation are as follows:

Documenting Program Planning in your Calendar

Purpose for documenting program planning activities in your calendar:

1. To be efficient in the use of time and travel by conserving both of these resources through the planning of groups in the same area on the same day
2. To help with planning your time and flexing hours. Sometimes you may be required to work in the evening or on weekends because that is the only time a group can meet. This is a difference between your position and other COSS positions. Your calendar should be used to help you plan a flexible schedule that allows you to meet the needs of groups outside of traditional hours while staying within your assigned hours of work for the week. Good planning results in *rare* need for comp time.

Procedures for documenting program planning in your calendar:

1. In your electronic calendar, document all work meetings, recruitment visits/activities, grocery shopping for work-related events, **name of lesson for each session**, time allotted for records and reports.
 - a. If you use a personal or county-provided smartphone that is synced to your work calendar as a back-up calendar in the field, the electronic calendar should reflect all program planning and lesson details.
 - b. If you use a printed calendar as a back-up for full planning, the electronic calendar can simply state the group name, location including address, time frame and title of lesson for each program and the activity and location for other tasks such as recruitment and grocery shopping.
2. Electronic calendars should be shared (in the Google calendar settings, choose 'see all event details') with your CED, your County AA, and your RNEA. You may share with other Extension staff at your discretion.
3. Keep *your calendar up-to-date*. Any change in your schedule should be immediately reflected in your electronic calendar and should be reported to key staff (CED, AA and RNEA). This is the calendar supervisors will use to approve travel, comp time, or locate you in the field.

Documenting your Time and Travel in your Calendar

Purpose for documenting your time and travel in your calendar:

1. Verifies time.
 - a. If questions arise regarding your time, the calendar serves as your documentation.
 - b. Update your calendar as soon as possible to verify the time you worked each day.
2. Justifies the need for comp time
 - a. Should you require comp time due to multiple events during a week, your calendar also serves as the documentation verifying the validity of your request for comp leave to your CED.
 - b. Earning comp time should be planned and pre-approved by your CED and supported by your RNEA.

- c. Consistent need of comp time suggests inappropriate planning and will require your CED and RNEA to review your planning process and may result in additional need for documentation above what is outlined in this document.
3. Verifies travel was done for work.
 - a. If a question arises regarding your travel report, your calendar serves as the documentation that you did the job you said you did.
 - b. The calendar, combined with your MARS and the teaching record for your group, will support you if your travel is ever contested.
4. To help you complete your request for travel authorization and travel reimbursement through the university system.

The calendar is retained as official documentation according to the policies of the organization. It becomes a part of your permanent record.

Your calendar should match the information in your MARS, Group Attendance Record, Record of Teaching, and Travel Reports and logs.

Procedures for documenting your time and travel in your calendar:

1. Include in your calendar: lesson names (time, date, location/address, and lesson name); annual leave/sick leave and/or flex time used; and hours worked each day (this should match the hours worked in Wolftime). See example below.

Wed 20
Check emails AM
Lorelei Observing
Office - 8 hours
O'Sullivan (9:00-9:45) 8:30 – 9:45am Sumner Elementary School 915 Harris Drive, Greensboro, NC
Coley 9:50am, Sumner Elementary Sch
Trigg (10:40-11:30) 10:40am – 12pm Sumner Elementary School 915 Harris Drive, Greensboro NC
Oak Hill Elementary Volunteer Luncheon 12 – 1:30pm
Oak Hill Spring (2:00-2:55) 1:30 – 3:30pm Oak Hill Elementary School 320 Wrightenberry Street High Point, NC 27260 Phone: 336-819-2925

Oak Hill Spring (2:00-2:55)



Wednesday, April 20, 2016
1:30pm – 3:30pm



Oak Hill Elementary School 320 Wrightenber



Travel, Set-up
Contact Anissa Lanzas; 5th grade girls
Exploring the Food Groups, Lesson 2: Be Foc
Travel to office

LESSON PLANNING

Lesson planning is critical to the success of your program. It is a road map that will help you reach your teaching goals resulting in high impacts. Lesson plans are documented in the Lesson Plan page and Record of Teaching found in the NC EFNEP Group Attendance Record (for adults), the Learning Experiences worksheet in the youth Group Enrollment form (for youth), and your calendar.

Purpose for documenting your lesson plan:

1. To demonstrate a planned lesson series for each group of participants
2. To utilize as a tool for communicating program details to participants in advance such as the next week's recipe. This allows you to determine if there are any allergies and if ingredient substitutions for the upcoming recipe will be needed.
3. To help with time management for multiple tasks. Scheduling grocery purchases for the week, pre-preparations for the week, paperwork, staff conferences, packing, etc. are more easily grouped when calendars are utilized in planning. This allows these tasks to be performed efficiently rather than become a burden. It also allows you to maximize your time with participants.

Procedures for documenting your lesson plan:

1. Adult educators document their lesson plans in the *Lesson Plan and Record of Teaching* for each group. Youth educators will document their lesson plan in the Learning Experiences worksheet in the Youth Group Enrollment Form.

2. **Adult** lesson plans should include: dates for each lesson, needs indicated by recall or survey, any known allergies or food restrictions, interests of participants, and issues or concerns of the group.

Youth lesson plans should include: dates for each lesson, curriculum and lesson, and food activity.

3. All fields of the Lesson Plan and Record of Teaching and the Learning Experiences worksheet should be completed.

SUCCESS STORIES

Success Stories are written to document the impact made as a result of your EFNEP programming.

Purpose documenting EFNEP Success Stories:

1. The State EFNEP Coordinator and the Regional Nutrition Extension Associates use these stories to share the program value to federal government, state agencies, county government and others. These detailed stories take the reader to your participants' personal experience and serve as compelling testimonies to the value of what you do.
2. The EFNEP State Staff choose the best of your stories to post on our website (ncefnep.org in the Partners portal) and share with program partners. There are times when the State EFNEP Staff will ask your assistance to interview a participant, family, group or program partner on

camera for a video success story. Submit EFNEP Success Stories as requested by your RNEA. Requests for these stories are sometimes tailored to highlight a particular success of the program.

Procedures for completing EFNEP Success Stories:

1. Write a story so that it tells the journey or path of a participant's improved nutrition, physical activity, food resource management, food safety, food security and even improved overall health and life.
2. Share via email or in your Google Drive, success stories (by July 1) which include the following elements:
 - What was their situation when you met them? (For example, spent all their food money before the next paycheck, drank soda at every meal, added salt to all foods, never exercised, etc.)
 - What did the participant do to better their situation? (For example, making shopping lists using grocery store ads and coupons, switching from soda to water, using herbs instead of salt, using a food thermometer, walking 30 minutes a day, etc.)
 - How has their life improved as a result of EFNEP? (For example, how much money have they saved from using coupons? How much weight have they lost from cutting back on calories or being more active? etc.)

Success Stories should include one of the focus areas:

- Diet Quality/Physical Activity
- Food Resource Management
- Food Safety
- Food Security

If you serve Adult and Youth, submit one story per program area. If you serve multiple counties, submit one story for each county (a minimum of 2 stories total).

Extension Success Stories are documented in ERS (see below). Consult with your CED to learn the procedures for completing Extension Success Stories in ERS.

EFNEP RECORDS

For Adult Educators:

- Entry and Exit forms
- The EFNEP Group Attendance Record includes:
 - Lesson Plan
 - Record of Teaching

For Youth Educators:

- Pre and Post evaluations
- The Youth Group Enrollment Form includes:
 - Enrollment sheet
 - Learning Experiences sheet
 - Vital Stats sheet

Transmittal Form

This form is a documentation of the records you submit to the State Office where it is dated upon receipt. The timely submission of records is reflected as a part of your performance appraisal. Records are due 9 business days of the date on the record.

These are the official program records used by the state to validate our program to our federal partners for the purpose of a program audit. Our state is mandated to retain documentation of participant education for a period of 2 years. NC utilizes a similar form to other states, but our form is customized to the curriculum we use.

The Group Attendance Record including the Record of Teaching (for adults) and the Learning Experiences sheet (for youth) should be updated after each session. This assures that you don't forget important details for the next class, follow-up questions that need referral to others and that your teaching records will match the information in your Monthly Activity Reporting System (MARS), calendar, and travel reimbursement requests.

Access NC EFNEP records and forms here: (<https://intranet.ces.ncsu.edu/efnep-program-resources/efnep-forms/>)

Monthly Activity Reporting System (MARS) WORKBOOK

- At the end of every month, document monthly activities to show your RNEA progress toward meeting target workload and reviewing timeliness and accuracy of records which are referenced during mid-year and end-of-year evaluations
- MARS Workbook includes the following worksheets:
 - MARS - documentation of groups, participant names entry/exit dates, number of lessons, sessions, and hours taught, and status of participants (highlight when completed)

- Extension and Non-Extension Contributions - document funds received for programming; used in ERS and federal reporting and accomplishment reports
- Delivery Sites - document locations where programming occurred and partnerships; used in ERS and federal reporting
- Volunteer list - document individuals who assist in programming efforts including demographic data, hours contributed, and type of volunteer (agency-paid, non-agency paid, formal, and student/interns); used in ERS and federal reporting and accomplishment reports
- Used to verify WebNEERS participant data and volunteer data

EXTENSION REPORTS (non-EFNEP)

One-Stop Shop

One Stop Shop, located in the NC State Extension Intranet, contains State, County, and Individual Performance and Reporting tools. EFNEP Educators will access One Stop Shop to complete their Individual Plan of Action and to complete the ERS. The One Stop Shop can be accessed here:

<http://newton.ces.ncsu.edu/oss/>

Individual Plan of Action

Every year, Extension employees (including EFNEP educators) are required to complete an Individual Plan of Action (POA). Your POA is a yearly plan based on your county's objectives. It details your work plan for the current year.

Consult with your County Extension Director (CED) regarding how to complete your Individual POA.

ERS

The Extension Reporting System, also known as ERS, is used to gather data to meet Extensions' various state and federal reporting requirements. Depending on the requirements, the reports are meant to capture a calendar year or a state fiscal year's worth of data. ERS data is frequently requested by the Governor's Office, NC Department of Environmental Quality, county commissioners and Congressional offices.

For more information and instructions on completing the ERS, consult your CED or click here:

<https://intranet.ces.ncsu.edu/intranet-ers-information/>