

New England Planning and Reporting System Overview

"Thank-you for creating a system that is easy to use, intuitively logical and reflective of the big picture and the details" - Program Leader, UMaine Cooperative Extension

The [New England Planning and Reporting System](#) (NEPRS) is a web-based application that enables Extension professionals to create their own reporting domain to:

- develop logic model based plans of work
- share outcomes and outcome indicators
- report on progress towards outcomes (goals)
- report time and effort
- report on audience number, participant type, and location
- report collaborative efforts with in-state and multi-state colleagues

Allows peers and supervisors to:

- review plans, reports, evaluation results and tools, attached articles, publications, etc.
- collate data for federal, state, University and other internal reports
- use data as input to faculty and staff performance review; programmatic decisions including hiring of staff and relevancy and progress of programs

And allows the public to:

- view finalized plans of work
- view customized reports on progress, effort, audiences reached, locations served, projects/programs, etc.

NEPRS was developed as a cooperative effort between Maine, Massachusetts, New Hampshire, and Vermont to facilitate reporting by Extension staff and the subsequent reporting by the state to the national Extension planning and reporting system (One Solution), state and county, and other stakeholders. The development effort began in 2004 and the system has been used by each state beginning with the 2007 planning year.

There are three integrated modules (planning, reporting, and reports). The system allows individuals to report directly against their planned outcomes (goals) and outputs (activities). The current system serves four different states and is highly customizable, enabling individual state administrators to set unique preferences and structure to best serve the needs of their respective state. Characteristics of the three sections are as follows:

Planning

- Plans are based on the logic model and include components such as situation statements, assumptions, external factors, outcomes, outcome/impact indicators, outputs, and inputs.
- Plans may span multiple years (up to five) and a subsequent year can be added each year to maintain rolling five year plans.
- Plans may be created for an entire state, group, and/or individual.
- If state or group level plans exist, an individual may select items from the higher level plans to include in their individual plan. This results in multiple individuals contributing to a single outcome, outcome indicator, or output, and facilitates aggregating of information from the entire state. This also eases the burden of data entry for the individual.



- Outputs and inputs (activities and resources such as effort and funding) are grouped by projects/programs. This grouping can be used to facilitate national reporting on planned programs, aggregate what's being done within the state in particular subject areas, or to inform programmatic decisions.
- Outcome/impact indicators can be created for each outcome to define how success in achieving the outcome will be measured.
- Target or goal measures can be collected for indicators, outputs, participants, and inputs.
- There is an integrated approval process, requiring review of plans by a designated supervisor before a plan is considered final.

Reporting

- Individuals report their outcome/impact indicator evaluation results and effort against what they planned for that year.
- All reported effort is associated with an output, which is associated to a project/program, and the effort can be broken down into several categories, including multi-state, grant, and integrated research effort.
- Audience information is collected for each output, including number reached, and a breakdown of race, gender, location, and participant type (participant types are defined by each state.)
- The system also allows state's to define their own narrative reporting requirements (such as success stories, impact statements, and anecdotes and quotes.) Each of these narratives may be associated with particular programs, outputs, participant types, locations, etc.
- When reporting, individuals may optionally attach supporting documentation in the form of uploaded files.
- As in planning, there is a mechanism for approval of reporting entries before they become final and available for public viewing.

Reports

- Reports are a view into the accumulated data in the system that has been acquired during the planning and reporting phases.
- Individuals registered with the system have access to detailed reports about their planned and reported activities, as well as that of their colleagues.
- Reports are also available to the public (users not logged into the system). These reports contain only approved or final information (approved by a supervisor).
- Reports are customizable through a number of filters, and represent information such as plans, indicator progress, outputs completed, and information related to specific programs, locations, and participant types.
- Reports can be viewed or saved in multiple file formats (html, pdf, Word)
- State administrators also have access to reports designed to facilitate system management and the entering of data into the national Extension system.

Each state has control over its own "version" of the system. This allows for customizing the look of the site, announcements to their users, user administration, custom settings and text, planning and reporting years, and many lists used throughout the system (e.g., participant types, output delivery methods, locations, collaborators, grants, integrated research projects, etc.) One of the primary goals of the system is to have a core application with sufficient flexibility for use by multiple states and changes as a state's needs evolve.

"the (NEPRS) system is the ONLY way we are going to be able to capture the complexity of what we are doing as an organization!" - UMass Extension Forestry Specialist

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