

# **REPORTING & IMPACTS**

## **MONTHLY REPORTING**

At the end of each month the Office Manager will send an e-mail reminder that Monthly Reporting is due. Submit reports to the Office Manager's mail box by requested due date. The reports include:

**Monthly Calendars** – These are used to document planned schedules. They are useful for the County Director to review your program work load and for clerical staff and others to know your schedules for supporting your work and answering clientele questions. You can create and print your own calendar or request for the Office Manager to provide printed calendars each month. Calendars include:

- Events & meetings attending out of the office
- Conference calls and webinars
- Part-timers show days and times scheduled
- Vacation and planned sick days

**Mileage Reimbursement Requests** – Mileage is due on the first of the month for the previous month's travel. If mileage is not turned in monthly it can create false figures in the budget.

- **Placer County Mileage** (Advisors, 4-H & Master Gardener Community Education Specialists) Electronic forms are obtained from and submitted to the Office Manager.
- **UC Mileage** (Community Education Specialists, Administrative Assistants) is reported through the AggieTravel on-line system. A mileage log is completed and submitted to your clerical support to enter and submit into AggieTravel. You will receive an e-mail notification to approve the submission.

**CASA** – Very important, submitted monthly. Forms are located in the front office or electronic copies can be obtained from the office manager.

**Program Reports** – Submitted monthly. Forms are located in the front office or electronic copies can be obtained from the office manager.

**Monthly Narrative** – These inform the County Director, Advisor and supervisor as to what you are doing and have planned for the coming month. A list of things is fine. It is also a good time to inform them of what you may need. If you turn in a detailed calendar, you can often say 'see calendar', rather than listing details again. This can be done electronically or handwritten. Roger will return these to you with comments or ask for additional clarification.

- **What is the program impact?** Make sure you are not too busy doing busy work. Balance where you are putting your efforts. Changes in behavior and knowledge are our focus. Look for ways to work smarter not harder. When you work with volunteers, look to see if there are ways you can cut down on the unnecessary interaction with them and ways to delegate work rather than taking on their work. Look for ways to be efficient – make lists and prioritize through the day. The same holds true for other staff.

## ***ANNUAL REPORTING***

**Annual Report** – Each program prepares a report that is compiled into one report for the office. The office manager will send out dues dates and previous year's pages for staff to plan and prepare the report. The process begins in April and is completed in June so it can be presented at annual County Budget meetings.