

15. GUIDELINES FOR ANNUAL REPORTS

Scope of This Section

This section describes the purpose of annual reports from each reserve, the categories of information to be collected, the date and channels for submission of the reports, and suggests assignment of reporting responsibility. This discussion applies to report data for use by the NRS Systemwide Office but does not address the scope, design, or emphasis of reserve annual reports that may be produced for other purposes such as informing campus administrators or the general public. Also excluded from this discussion are reports by NRS advisory committees at the Universitywide or campus level to the President or Chancellors, respectively.

Purpose of Annual Reports

Annual reports provide quantifiable measures of current demand for use of NRS reserves, demonstrating their importance to University academic programs. Trends in reserve use help UC and the NRS plan and justify acquisitions, staffing, and improvements. The affiliations, course titles, research projects, and publications of reserve users illustrate the areas of study each reserve supports. This information is obtained and stored in the Reserve Application Management System (RAMS) (<https://rams.ucnrs.org>). RAMS also serves as the central storage location for the annual use data for the NRS reserves, and is the portal for annual report submission to the NRS Systemwide Office at the UC Office of the President. All data used in the annual report come from approved reservations with that fiscal year.

Content of Annual Report

- Part 1: Reserve Use Data. Records the number of users and the duration of their reserve use in three categories that reflect the three-pronged mission of the NRS — university-level research, university-level teaching, and public service.
- Part 2: Reserve Users' Affiliations. Indicates the breadth of institutions benefiting from NRS use.
- Part 3: Use By Instructional Groups. Provides a list of the college level classes that have been at the reserve.
- Part 4: Current Research. Represents ongoing research activities.
- Part 5: Publications. Provides a record of the concluded calendar year's publications resulting from work supported by a reserve, which should be maintained and included in the annual report, as well as submitted to the online NRS Bibliographic Database, currently maintained on Zotero and found at <http://www.ucnrs.org/>. (See also Chapter 9 of the Administrative Handbook, Program: Teaching and Research.)
- Part 6: Narrative. Provides an opportunity to report on any items of interest or concern that may not be adequately addressed in other parts of the report. Suggested topics include: 1) highlights and stories that can be featured in NRS and campus promotions and reports (e.g., significant scientific discoveries, notable press coverage, visits by University officials or other significant stakeholders, major events, etc.); 2) any events or activities that may have impacted or will likely impact reserve use levels (e.g., major changes to facilities, programs or staffing; grant awards or philanthropic

support, collaborations or agreements with other reserves or partner agencies); and/or 3) any major events, changes, or impacts that would be important to document for historical purposes (e.g., fires, floods, major weather anomalies, population die-offs, significant habitat alterations, etc.).

- Part 7: NRS Campus Committee Roster. Provides a record of membership of the reserve's Management Advisory Committee, Campus NRS Advisory Committee, or any other organizational support group or body affiliated with the reserve (See Chapter 5 of the Administrative Handbook).

Date for Submission

Annual reports covering activity on the reserves from July 1 through June 30 should be provided to the NRS Systemwide Office by September 30 of that year, at which time the NRS Systemwide Office will begin utilizing data submitted in the annual reports. Data not marked as approved by the manager by September 30 will be omitted from any reports, data visualizations, or other publications.

Submitting Reports

Annual reports should be prepared and submitted using RAMS by the reserve manager or director.

Responsibility for Report Preparation

Generally, preparation of the report is the responsibility of the reserve manager under the direction of their supervisor or NRS faculty director. It is recommended that responsibility for report preparation be included in the job description used to

recruit the reserve manager. If other staff provide major assistance in report preparation, their job descriptions should also reflect this duty.

Definitions

One of the purposes of the annual reports is to document reserve use across the NRS. As data are combined and used to support all of the reserves, it is important that all staff record data in an equivalent manner, one that facilitates cross-reserve comparisons and systemwide summaries. The following definitions provide guidance on how reserve use should be recorded.

Definitions of Reserve Use:

A. Reserve use will be tracked in two ways:

1. *Users* — The number of unique individuals who visited a reserve.
2. *User days* — The number of days that unique individuals spent at a reserve.

B. Type of reserve use falls under one of three general categories:

1. *Research* – For the purpose of carrying out field or laboratory-based research applications under any discipline. Also includes conferences, symposia, academic meetings, and lab retreats of research groups.
2. *University-level class* – For the purposes of university-level instruction.
3. *Public service* – All other uses including, but not limited to, public use, community events, administrative meetings, fundraising and development

activities, monitoring for species status and adaptive management, K-12 classes, other classes, docents, volunteers, agency use, and non-research NGO use.

Definitions of User and User Day

A *User* is a person physically setting foot on a reserve or reserve-managed area in order to utilize the resources provided by a reserve.

A *User Day* is quantified by any portion of a day (1 minute to 24 hours) at a reserve, and includes the following:

1. Day use
2. Overnight use
 - a. One overnight stay counts as two user days
 - b. Overnight use includes utilizing accommodations even without actual use of the habitat or lab facilities at a reserve.
3. Multiple Project Use
 - a. Because RAMS is project-based not individual user-based, time spent on different projects on the same day can count as multiple user days.

Activities that qualify as users and user days:

1. Research activity

2. Instructional, classroom or teaching activity
3. Public outreach activities with a broad range of user types including, but not limited, to:
 - a. Reserve event attendees
 - b. Community groups or members
 - c. Local representatives
 - d. Elected officials
 - e. University administrators
 - f. Donors and donor prospects
 - g. Volunteers
 - h. Docents
 - i. Agency representatives
4. Site visitation by users or potential users to scope for future visits
5. NRS staff time is counted under user days if NRS staff are carrying out work on behalf of a research project, class, or stewardship activity which is beyond the definition of their role as an NRS staff member (i.e., as a researcher or instructor, if neither research nor instruction are part of their job duties).

Activities that do NOT qualify as users and user days:

1. The length of time that experimental equipment (including digital instrumentation) or materials are deployed
2. Construction crews/contractors
3. Delivery people/deliveries
4. Friends/family of NRS staff on social visits
5. Grounds keeping/maintenance and facilities upkeep (by NRS staff or contracted services)
6. Caterers
7. Inspections
8. Residential staff (non-work time)