Virginia Cooperative Extension
Virginia Tech • Virginia State University
Publication 490-851
Revised 2013

Extension Contacts Reporting Fact Sheet

Joseph R. Hunnings, CALS Planning and Reporting Manager, Virginia Tech

Purpose of Extension Contacts Reporting

Virginia Cooperative Extension (VCE) recognizes the importance of diversity and inclusion in the development and implementation of Extension programs. However, beyond our own interests in program inclusion, as a federally funded agency, VCE is required to comply with USDA Civil Rights nondiscrimination policies, rules, and regulations. Specifically, VCE must establish and maintain a system for collecting and reporting data on clientele participation in Extension programs. This data system must obtain racial, ethnic, and gender data on all significant aspects of program participation. The contacts data are also supplied to the state government to illustrate the extent to which we reach Virginians with our educational programs.

What Is a Contact?

VCE collects both direct and indirect educational contacts. Both types of contacts are reported by one of the ten Planned Programs (and the Virginia Emergency Preparedness program) and by date. This enables us to summarize data by program and by calendar and fiscal year.

A ***Direct Contact*** refers to the face-to-face interaction with clientele where there is an exchange of educational information. Direct contacts occur in office, field, or home consultations, conferences, workshops, seminars, meetings, and similar activities in which the educational mission of Virginia Cooperative Extension is carried out.

Direct Contacts are reported **by gender** (female or male) and the following designations of ***ethnicity and race***:

- **Hispanic or Latino Ethnicity**. A person of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish culture or origin, regardless of race.
- **American Indian or Alaskan Native**. A person having origins in any of the original peoples of North America, and who maintains cultural identification through tribal affiliation or community recognition.
- **Asian.** A person having origins in any of the original peoples of the Far East, Southeast Asia, or the Indian subcontinent including, for example, Cambodia, China, India, Japan, Korea, Malaysia, Pakistan, the Philippine Islands, Thailand, and Vietnam.
- **Black or African American**. A person having origins in any of the black racial groups of Africa.
- **Native Hawaiian or Other Pacific Islander**. A person having origins in any of the original peoples of Hawaii, Guam, Samoa, or other Pacific Islands.
- **White**. A person having origins in any of the original peoples of Europe, North Africa, or the Middle East.

Direct contacts are also reported by ***age***. USDA annual reporting requirements now include designation of contacts into youth and adult categories. In addition, Virginia state government has requested that we provide contact data for senior citizens. To meet these requirements, VCE uses three age categories:

- ≤ 18 – less than or equal to eighteen years of age. This category will be used to report “Youth” contacts for USDA reporting purposes.
- 19-64 – nineteen to sixty-four years of age. This category will be included in the “Adult” contacts count for USDA reporting purposes.
- ≥ 65 – greater than or equal to sixty-five years of age. This category will be included in “Adult” contacts count for USDA reporting purposes and be used to report “senior citizen” contacts to the state government.

www.ext.vt.edu
Produced by Communications and Marketing, College of Agriculture and Life Sciences, Virginia Polytechnic Institute and State University, 2013

VT/0713/VCE-210NP

An ***Indirect Contact*** refers to several other means besides face-to-face contacts by which an Extension staff member engages a client in Extension programming. Those indirect means include:

- *Contacts by E-mail* – Report the total number of e-mail contacts made in response to requests for information in support of a Planned Program.
- *Contacts by Newsletters* – Report the total number of newsletters distributed in support of a Planned Program. (The number of issues multiplied by the number of people sent the newsletter.)
- *Contacts by Telephone* – Report the total number of telephone calls handled in response to requests for information in support of a Planned Program.
- *Contacts by Non-electronic Correspondence (Other)* – Report the total number of non-electronic correspondences mailed in support of the Educational Program. Examples of non-electronic correspondence are letters, and educational publications requested and mailed with a transmittal slip.

Like direct contacts, indirect contacts are also reported by age. However, the age categories are slightly different. Indirect contact age categories include youth (≤18), adult (19-64), senior (≥65), and unknown. Since indirect contacts are not face-to-face, if the individual is not known, it will be difficult to know the age category of the contact. However, for known individuals on phone calls, email notes, and newsletter lists, the age category may be known. If it is not, designate the indirect contact age as "unknown".

Distinguishing Between Educational Contacts and "Business-Related" Contacts

It is important to be able to distinguish between contacts of an educational nature and those of a "business" nature. VCE is only interested in collecting educational contacts. An educational contact with a client should reflect the VCE Mission: *Virginia Cooperative Extension enables people to improve their lives through an educational process that uses scientific knowledge focused on issues and needs.* Ask these questions if you are not sure:

- Does your contact with the client use an educational process (i.e. consultation, presentation, publication, etc.)?
- Does your contact with the client use scientific knowledge (i.e. the scientific knowledge of a staff member, a publication or a website)?

Contacts that are of an extension "business" nature should not be counted. Examples of "business-related" contacts include: responses to inquiries about the time and place of events, even if the event is an educational

Table 1. Contact Reporting

Staff Who Must *Collect* Contact Data	How Staff Members *Report* Contact Data
All Extension faculty (agents, specialists, research associates and administrators, etc.)	Must personally report contact data
4-H Center Directors and Program Directors	Must personally report contact data
Program Associates	Must personally report contact data
Program Assistants	Must personally report contact data
Program Technicians	Must personally report contact data
Project Associates	Must personally report contact data
Administrative Assistants at all levels	Must provide contact data to supervisor
SCNEP and EFNEP Program Assistants	Will provide contact data to their District Program Coordinator
Salaried county/city employees supervised by Cooperative Extension	Will personally report or will submit contact data to supervisor (depends on position)
Volunteers in all program areas	Must provide contact data to the VCE staff member for whom they are volunteering

program; client referrals to another office or program; confirmation of a registration for a program; or a request for a consultation. If your contact with the client does not use an educational process and scientific knowledge, it should probably not be counted as a contact. For more examples see the FAQ section of this fact sheet.

Who Is Required to Collect and Report Contacts?

All people employed with Virginia Cooperative Extension by Virginia Tech and Virginia State University and those who volunteer for VCE, who have contact with clientele for the purpose of educational delivery, are required to *collect* clientele contact data. Table 1. lists groups of staff members who must *collect* contacts and how those groups are to *report* their contacts.

Contacts reporting is conducted through the CONTACTS reporting system found on the VCE Intranet (*www.ext.vt.edu/vce/reports*). In order for employees to report contacts, they must have an active Virginia Tech PID (a computer user id and password). Call (540) 231-4865 to get the information required to obtain a PID, if you do not have one.

Contacts Reporting Policies and Guidelines

- Direct and Indirect Contacts must be reported by Planned Program and Date at least monthly. The CONTACTS computer application on the VCE Intranet is used to report contacts.

- More than one contact with the same individual during a single day can occur if the individual participates in different Planned Programs. Report these contacts under the appropriate Planned Programs.

- If more than one faculty member addresses an audience during an educational program, each faculty member reports the entire audience as face-to-face contacts.

- More than one activity can sometimes be combined into a single contacts record. For example, you may combine all of your farm visits or 4-H club meetings into one monthly summary record if all pertain to the same Planned Program.

- Face-to-face educational programming contacts between Extension staff members and volunteers is reported in the Direct Contacts section.

- Contacts related to Extension business (non-educational in nature) between Extension staff members and between Extension staff members and volunteers; i.e., internal contacts, should not be reported.

- Contacts related to Extension educational programming between Extension staff members (Specialist to Agent, Agent to Agent, Agent to Program Assistant, etc.) such as in-service training, should not be reported.

- Many contacts are made by Extension Administrative Assistants and other support staff members and volunteers with clientele who call or visit the Extension Office. Records of these contacts will be kept by the support staff members and volunteers with a notation to help the faculty member place the contact within the appropriate Planned Program. These records will be given to the appropriate Extension faculty member who should report these contacts under the applicable Planned Program. If the contact was face-to-face, the data should be recorded and reported as a Direct Contact. If the contact was by a means other than face-to-face, then the contact should be recorded and reported in the appropriate Indirect Contact category. Support Staff Contacts Log, VCE publication 490-854, is available for support staff and volunteers to use in office environments for the purpose of collecting direct and indirect contact information.

- All VCE volunteers who conduct educational programs should be trained and are expected to record clientele contacts. These records will be shared with the appropriate faculty member for reporting purposes.

- You are not required to use any of the VCE forms to record contacts, but you must have some method of documenting your contacts that conforms to the VCE format and policies. You can design your own form or use an Excel spreadsheet to record contact data.

- All paper records of contacts data must be retained for a period of three years from the date of record. This includes hard copies of the Program Participant

Figure 1. Program Participant Self-reporting Format for Direct Contacts

GENDER (select one)		ETHNICITY (select one)		RACE (select one or more)					AGE (select one)		
Female	Male	Non-Hispanic or Latino	Hispanic or Latino	American Indian or Alaskan Native	Asian	Black or African American	Native Hawaiian or other Pacific Islander	White	≤ 18	19 - 64	≥ 65

Self-reporting Forms, Attendance Logs, Observer-collected Contacts Logs, VCE Daily Contacts Logs, Support Staff Contacts Logs, or their equivalents.

- Educational materials delivered by mass media methods (websites, TV, radio, and newspaper articles) should NOT be counted as contacts. It is often difficult to determine how many people actually read content on a website, hear a radio program, or read a newspaper article you prepare. Consequently, contacts made through media are not considered contacts for the purpose of the VCE Contacts Reporting system because the individuals with whom information was exchanged cannot be effectively identified or quantified.

Procedures for Collecting and Reporting Direct Contact Information

Federal guidelines for the collection of gender, race, and ethnicity data allow for two formats. The first format is the **"Program Participant Self-reporting Format"** – in other words, self-identification by the clientele itself (see Figure 1). This is the preferred method for collecting race and ethnicity data of clientele because it is the most accurate. In this format, the question of ethnicity (Hispanic or Latino; Not Hispanic or Latino) is collected first followed by reporting of the five race categories: American Indian or Alaskan Native; Asian; Black or African American; Native Hawaiian or Other Pacific Islander; and White. Respondents can choose one or more races.

In order to capture all clientele contacts, VCE staff members using the program participant self-reporting format are required to note the number of clients who did not voluntarily report their demographic data. Those "did not report" contacts will need to be reported as well as those contacts that provided their demographic data. If the number of clients not reporting demographic data is a significant part of the total audience, staff members should use their best judgment in determining the need to use the *Observer-collected Format* (see Figure 2) in order to record a more complete picture of the demographic make-up of the audience.

Program Participant self-reported contacts data are reported using the CONTACTS reporting system found in the VCE Intranet. A Virginia Tech PID is required to input data. Faculty that choose to use either one of the two client "self-reported" contact reporting forms (listed below) are provided with a computer-interface process that allows direct input of the client-reported data. The interface will also allow for identification of the Planned Program, date, and an optional short description of each set of data. Program participants self-reported data will be converted into the final *Combined Reporting Format* (Figure 3). In addition, faculty can choose to convert the self-reported data themselves for direct input into the *Combined Reporting Format*. This requires understanding of the "rules" of conversion. These rules are listed in the Appendix of this document.

Two VCE publications are available for collection of *self-reported* demographic data. They are:

- VCE publication 490-850 – Program Participant Self-Reporting Form. This form is used in cases where each individual would receive a form and be asked to voluntarily complete and submit it.
- VCE publication 490-152 – Attendance Log. This form is used in situations where demographic data is collected from the group such as at a registration table.

The second method for collection of contacts allowed by federal guidelines is called the **Observer-collected Format**. In this method, the VCE staff member collects the demographic data using direct observation of the clientele (see Figure 2). In most cases, this will be the format most used by VCE staff members.

In this format, "Hispanic or Latino" is added to the same five race categories listed above in the "self-reporting" format. All program participants observed to be of the "Hispanic or Latino" ethnicity are combined under the race category of "Hispanic or Latino and One or More Races."

When using the observer-collected format the observer must choose a gender, race, and age for each program participant. Unknown gender, race, and age are not choices in this format.

Several VCE publications are available for collection of *observer-collected* demographic data. They include:

- VCE publication 490-852 – Observer-collected Contacts Log - This form is used in cases where the VCE observer collects the demographic data from direct observation of the clientele. Best used for group settings.
- VCE publication 490-853 – VCE Daily Contacts and Travel Log. A pocket sized log that is best suited for use in the office and for non-group settings.
- VCE publication 490-854 – Support Staff Contacts Log – designed for use by support staff members and volunteers in office settings.

Federal guidelines allow for contacts *reporting* in a "**Combined Reporting Format**." (see Figure 3) The combined format is used to aggregate the client self-reported and observer-collected data.

Staff members who choose to use any of the "observer-collected" contact reporting forms are provided with a computer-interface based on the "*Combined Reporting Format*" (see Figure 3) that allows direct input of the observer-collected data. The interface will provide for the identification of the Planned Program, date, and an optional short description of each set of data. The interface is also part of the CONTACTS reporting system found on the VCE Intranet.

Besides being used for the input of Observer-collected data, the Combined-reporting Format can also be used for input of aggregated Client Self-reported data. In other words, VCE staff members can tally all of the

Figure 3. Combined Reporting Format for Direct Contacts

		Race or Ethnicity								
Gender	**Age**	American Indian or Alaskan Native	Asian	Black or African American	Hispanic or Latino and One or More Races	Native Hawaiian or other Pacific Islander	White	More than One Race	Did Not Report Race/ Ethnicity	**Incomplete Demographic Data**
Female	≤ 18									
	19-64									
	≥ 65									
	Did not report age									
Male	≤ 18									
	19-64									
	≥ 65									
	Did not report age									

client self-reported demographic information from an educational program and enter it as one record in the Combined Reporting Format interface. This requires knowledge of the "Rules for Conversion of Program Participant Self-reported Data" found in the appendix.

Procedures for Collecting and Reporting Indirect Contact Information

Indirect contacts are through e-mail, phone, other correspondence (letters, publications), and newsletters. Like Direct Contacts, these contacts are also categorized by Planned Program, date and age (see Figure 4). The age categories include youth (≤18), adult (19-64), senior (≥65), and unknown. Indirect Contacts are reported in the CONTACTS reporting application in the VCE Intranet.

Indirect contacts often occur in the office environment, when one receives phone calls, e-mails, or correspondence by letter or sends out newsletters to a mailing list or publications to a client. However, with today's technology, indirect contacts may occur on a cell phone while a staff member is on the road, or from the home computer at night while trying to catch up on e-mails. The critical thing to remember in collecting indirect contacts is to only collect those contacts that are of an educational nature.

The VCE Daily Contacts and Travel Log (490-853) is a good tool for Extension staff members to document indirect contacts. Support staff and volunteers working in office settings should use the Support Staff Contacts Log (490-854).

Contacts Reporting FAQ's

How often should I report Extension Contacts?

It is recommended that clientele contacts be recorded on a monthly basis. Some faculty members find that recording contacts more often results in less confusion and reduces chances of losing data. The CONTACTS reporting system allows users to enter data as often as needed.

How do I maintain an accurate count of my Extension contacts?

The recommended procedure for maintaining accurate clientele contacts is to put into place a system that works for you so you can collect data in all the settings in which you work. Most faculty/staff members use a log to record contacts while in the office or while out visiting clientele. You should also become familiar and confident with the tools available to collect demographic data in group settings. Set aside time in your calendar on a regular basis (at least monthly) to record the data you have collected.

Direct Contacts are defined as face-to-face interactions with clientele where there is an exchange of educational information. Please give some examples of what is included and what is not.

Educational information may be provided in a face-to-face conversation or a presentation where a recommendation is given or an explanation of educational subject matter is provided. If an Administrative Assistant provides a publication or other written material to a client who walks into the office, this is a direct contact. A volunteer conducting an educational workshop should count the audience as direct contacts. However, if the face-to-face contact only pertains to the dates of the fall feeder-calf sales, the place of the "Quantity Cooks" workshop, or to sign up a child for 4-H camp, then the contact is not educational, but more "business" in nature. Business-related Extension contacts should not be counted.

I don't have age information for the direct contacts that I collected from January through July. What do I do?

Just like any other "Observer Collected" contacts, you report these contacts in the "Combined Reporting Format" interface. Record the contacts using the appropriate race/ethnicity selection in the "Unreported Age" row for the correct gender.

An indirect contact is defined as engaging clientele in educational programming through e-mail, phone, and other means. Can you give some specific examples of what is and what is not included as an indirect contact?

If the contact is via a phone call, an e-mail, or a letter and educational information is shared, then this would be considered an indirect contact. Examples of indirect contacts include: Administrative Assistant sends a VCE publication to address a question that was posed by a client on the phone; a faculty member responds by e-mail to an e-mail request from a client for a recommendation on what pesticide to use to control a weed; an agent sends out an educational newsletter to a mailing list. Sending out flyers about an upcoming meeting, responding to a phone call about 4-H camp counselor job openings, or submitting an article to the local newspaper are not valid indirect contacts. These are examples of "business-related" contacts.

How should I report contacts when the subject matter I am teaching crosses two or more Planned Programs?

Make a judgment call and record the contacts in one Planned Program or split the contacts among multiple Planned Programs.

Why can't the information about 4-H members that we put into the 4-H Plus system be used for contacts reporting?

4-H Plus is a system for recording 4-H enrollment information among other things. Enrollment information is not the same thing as contacts information. You cannot use a 4-H club's enrollment records in place of contacts. The number of youth enrolled may or may not equal the actual participation of youth in a club program. 4-H club leaders should report to the 4-H agent or other faculty member, the actual direct contacts with youth attending club meetings and other club events as the true measure of contacts. The 4-H Secretary's Record book is an excellent means of 4-H club contact information.

We conduct 4-H enrichment programs once a month in every 4th grade classroom in our county. How do I count these contacts?

First of all, since the contacts are "direct," demographic data is required. It is suggested that you create a roster of all of the students in each classroom that includes the required demographic data. Each month you would use the roster for each classroom to record attendance at the 4th grade 4-H program. As long as all of the classroom programs fit the same Planned Program, you could tally the numbers and report the aggregate figures for the month.

Our Extension office offers an agriculture awareness program every year to the local elementary schools. It is an outside event that involves over a thousand youth. How should I collect contacts data?

If there is no practical means to collect data on each individual youth, then you can rely on information that can be provided by the school system. The school has data on the cumulative demographic make up of its student body that they should be willing to share with you. While these numbers may not be 100 percent accurate (due to absences for example), under most circumstances this would be a very acceptable means of collecting contacts data for this event.

How is contacts data used?

Contacts data can be sorted and reviewed using multiple criteria, including demographics, time, place, and program. This contacts data is useful in providing information about clientele participation in VCE programs to federal, state and local partners, and other stakeholders. Perhaps most importantly, contact information on race and gender is used to meet state and federal laws on affirmative action. Some other uses include the reporting of youth and adult contact information in the CALS annual report to USDA; documenting outreach to "senior citizens" for the state government and using contacts data for program planning purposes.

Appendix

Rules for Conversion of Program Participant Self-reported Data

Staff members who wish to consolidate demographic records from client self-reporting formats in order to report the data in the Combined Reporting Format should use the following "rules". Conversion by staff members is not required since the computer interface will make the appropriate conversions automatically when individual records are entered. However, in some cases it may be more efficient to make the conversions manually than to enter each individual client record.

1. If gender is unreported, whether or not we have any other demographics for this person, the record is placed in the "Incomplete Demographic Data" category.

2. If age is the only item unreported (we have gender and ethnicity/race), then the record gets tallied under the appropriate race and the unreported age category for the correct gender.

3. If ethnicity and race are unreported but we have gender and age, the record is tallied in the unreported race/ethnicity category in the appropriate box for the age and gender.

4. If "Hispanic or Latino" ethnicity is reported and we have gender and age, whether we have race data or not, the record gets tallied under the "Hispanic or

Latino and one or more races" category within the correct age and gender category.

5. If race is unreported but we have gender and age and "Not Hispanic or Latino" ethnicity is reported, the record gets tallied under the "Unreported Race/ Ethnicity" category within the correct age and gender category.

6. If a record with gender and age info is designated as "Hispanic or Latino," it gets tallied under the "Hispanic or Latino and one or more races" category within the correct age or age category. This holds true even if there is more than one race listed for the record.

7. If a record has gender and age info and "Not Hispanic or Latino" ethnicity is reported, and more than one race is reported, the record is tallied under the "more than one race" category in the designated gender and age categories.

8. If age and ethnicity and race are unreported, the record is tallied in the unreported race/ethnicity category in the unreported age category for the appropriate gender.

9. If ethnicity and age are unreported but we have gender and race, the record is tallied in the designated race category, in the unreported age category and in the appropriate gender category.

10. If ethnicity is unreported but we have race, age, and gender, the record is tallied in the designated race category, and the appropriate age and gender categories.