



UNIVERSITY OF
FLORIDA

AEC 362

EXTENSION

Institute of Food and Agricultural Sciences

Extension Contacts: Definitions and Examples¹

Marilyn Norman and Glenn Israel²

One measure of the quality of an Extension program is the number of people who rely on it for educational information (clientele contacts). A second measure of quality is Extension faculty's ability to deliver that educational information in ways acceptable to those people (educational contacts). From an accountability perspective, it is important that Extension faculty record these two measures of quality.

The purpose of this fact sheet is to describe how the Faculty Accomplishment System (FAS2000) software should be used to report clientele contacts and educational contacts. The fact sheet also defines the two types of contacts and provides examples for recording contacts. Accuracy in reporting these contacts is very important because the clientele contact information on race and gender is used to meet state and federal laws on affirmative action. Also, educational contacts are included in accountability reports that reflect the quality of Extension educational methods.

In addition, Extension faculty should be aware that six categories of educational contacts are included in a *proposed* UF/IFAS Extension and Research funding formula. Though a final decision

on using the formula has not been made, establishing a track record of accurate data can further enhance chances Extension's reputation for providing objective information. The six categories are: 1) number of office visits, 2) number of visits to clientele, 3) number of telephone calls, 4) number participating in group learning experiences, 5) number of times mass media was used, and 6) number of educational materials prepared. These items are marked with an asterisk (*) in Table 1.

Clientele Contacts

The Florida Cooperative Extension Service defines a *clientele contact* as having an intent to convey educational information and classifies the following as legitimate, reportable contacts:

- Face-to-face interaction in meetings, workshops, and offices;
- Individual correspondence by letter or telephone;
- Interactive video conference; and
- Newsletters and tabloids mailed to individuals who are included on a CES list with information about race/ethnicity and gender

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2. Marilyn Norman, Associate Professor and District Extension Director, and Glenn Israel, Professor, Florida Cooperative Extension Service, Institute of Food and Agricultural Sciences, University of Florida, Gainesville, FL 32611. The authors wish to thank Larry Arrington, Cheri Brodeur, Howard Ladewig, Bryan Terry, and Pete Vergot for comments on earlier versions.

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Clientele Contacts

From Date	To Date	SMP	Program Number	Person Name	Days Expended	White	Black
1/1/01	1/31/01	FL114	CMP-21	John Q. Profe...	15.0	213	31
1/1/01	1/31/01	NONE	CMP-22	John Q. Profe...	5.0		
1/1/01	1/31/01	FL114	CMP-21	Harry P. Assist	20.0	213	31
2/1/01	2/28/01	FL114	CMP-21	John Q. Profe...	8.0	69	0
2/1/01	2/28/01	NONE	CMP-22	John Q. Profe...	12.0		
2/1/01	2/28/01	FL114	CMP-21	Harry P. Assist	20.0	159	64

Figure 1. Clientele Contacts form in the Faculty Accomplishment System software (FAS 2000).

Federal affirmative action rules require clientele contacts to be recorded by racial-ethnic and gender categories (Figure 1). Faculty should refer to the IFAS Fact Sheet PE-50, "Guidelines for Reporting Clientele Contacts," <http://edis.ifas.ufl.edu/Pd035>, for additional information.

A faculty member is responsible for reporting days expended for program assistants, support personnel, and volunteers that he/she supervises. Use the "Person Name" column to identify the individual making clientele contacts and expending days (Figure 1). County faculty who supervise EFNEP units should report a summary of clientele contacts for the whole unit (e.g., Miami-Dade EFNEP Unit A). Likewise, faculty who supervise volunteers should report a summary for the group as a whole (e.g., Master Gardeners) and not for individual volunteers.

Clientele contacts should be reported by the related State Major Program (SMP). Because FAS2000 software allows only one SMP number per row in the clientele contacts table, use one row per SMP. Clientele contacts for an educational event

(e.g., workshop, field day) may be distributed among two or more state major programs using a row for each SMP or all of the event's contacts can be reported to the primary SMP using one row in the table. Each time you insert information on clientele contacts, indicate the reporting period and state major program, as well as your program number (the latter is generated by the faculty member in consultation with the unit leader).

Extension employees should not be counted as either clientele contacts or educational contacts. Training for other Extension employees should be reported in the Extension educational activities section of Extension programs tab in your report of accomplishment using the FAS2000 software.

Finally, a faculty member is responsible for reporting days expended for program assistants, support personnel, and volunteers that he/she supervises, as well as the faculty member's days expended.

Educational Contacts

Educational contacts are based on the method used to deliver educational information (see Figure 2). These methods include:

- Letters and emails;
- Office visits;
- Visits to clientele;
- Group learning events, such as seminars;
- Radio or TV broadcasts.

In many instances, Extension faculty should record information on both educational contacts and clientele contacts. For example, when a faculty member makes a farm visit, he or she should record: 1) the number of persons for “visits to clientele” in the educational contacts form and 2) the gender and racial-ethnic characteristics in the clientele contacts table. We recommend that faculty enter educational contacts at least monthly into the Faculty Accomplishment's System (FAS2000) software. The form is designed so that it can be used often (e.g., after each workshop).

Each time information is inserted on educational contacts, the reporting period (date), relevant state major program, and the program number (recall that the latter is generated by the faculty member in consultation with the unit leader) should be reported. FAS2000 software allows multiple SMP numbers per form (or row if using the table view) in the educational contacts tab. Educational contacts for an educational event (e.g., workshop, field day) may be distributed among two or more state major programs or all of the event's contacts can be reported to the primary SMP. We recommend using one record per State Major Program (SMP) or one line per SMP if you use the table view. Readers should note that FAS2000 software allows the user to view educational contacts in two ways: 1) a fill-in-the-blank form, which is illustrated in Figure 2, and 2) a spreadsheet-like table. Do not duplicate contacts by reporting the same numbers for two or more state major programs.

Definitions and Examples

Table 1 provides a definition and examples for each category of educational contact. In addition, the tab (e.g., Educational contacts, Clientele contacts, or both) used in the Faculty Accomplishment System (FAS2000) software is listed.

FAS2000 - John Q. Professor #030088 Year: 2001

Report of Accomplishments | Plan of Work

Personnel | Teaching | Research | Extension | Funding | Publications | Other Products | Service | International | Profess

Program | Multistate | Integrated Project | Leadership and Administrative | Statistic Report | Other Activities

Educational contacts | Clientele contacts | Outcome measures

Educational contacts Table View

Reporting From: 1/1/01 To: 1/31/01 SMP FL114 + Program CMP-21

Individual	Group	Mass media	Materials	Volunteers
Letters/e-mail 12 ¹	Learning events 2 ⁵	Times used 0 ⁸	Prepared 1 ¹¹	Number 0 ¹⁴
Office visits 15 ²	Participants 265 ⁶	Contacts 0 ⁹	Direct mailings 543 ¹²	Training hours 0.0 ¹⁵
Telephone calls 120 ³	Instruction hours 530 ⁷	Web page hits 0 ¹⁰	Other distribution 10 ¹³	Volunteer-hour 0.0 ¹⁶
Visits to clientele 3 ⁴				Contacts 0 ¹⁷

Current Record: 1 Total Records: 1

Figure 2. Education contacts form in the Faculty Accomplishment System software (FAS 2000). Starred numbers refer to definitions in Table 1.

Table 1. Definitions and Examples of Extension Contacts.

Tab(s) to use	Definition	Examples
Educational Contacts and Clientele Contacts	<p>1. Number of letters/emails: Faculty should report a count of letters and e-mail messages providing educational information which are sent to individuals. Faculty should include counts for program assistants, support personnel, and volunteers under his or her supervision. Faculty may record letters/e-mails as clientele contacts if they know the race and gender of those receiving the letters/e-mails. Note: when sending a quarterly newsletter using a mailing list, the contacts should be reported in #12, Number of direct mailings.</p>	<p>A secretary records the outgoing count of mail that has brochures, publications, and informational correspondence; he or she tallies for each agent monthly and totals for the year. Agent moves educational email contacts to a separate file folder - incoming requests and responses, counts them at the end of each month for a monthly report for the CED.</p> <p>Not Correct: A secretary tabulates incoming and outgoing mail, including junk mail, individual correspondence, and newsletter mailings.</p>
Educational Contacts and Clientele Contacts	<p>*2. Number of office visits: Faculty should keep a written log of contact with clientele who visit an Extension office. A contact is recorded when educational information is transferred to the client. Faculty should include counts for program assistants, support personnel, and volunteers under his or her supervision. Faculty may record office visits as clientele contacts if they know the race and gender of those making office visits. *Required for the funding formula.</p>	<p>A secretary provides educational information and a faculty member provides more information to a walk-in client (2 contacts). Each agent keeps a log of walk-in clients, noting appointments and drop-in clients by the topic of the visit.</p> <p>Not Correct: A secretary logs each person who walks through the front office door. It cannot be assumed that everyone received educational information.</p>
Educational Contacts and Clientele Contacts	<p>*3. Number of telephone calls: Faculty should keep a written log of telephone contacts with clientele. A contact is recorded only when an agent, program assistant, support person, or volunteer passes along educational information to a client. Faculty may record telephone calls as clientele contacts if they know the race and gender of telephone contacts. *Required for the funding formula.</p>	<p>In response to a telephone call, a secretary reads part of an educational pamphlet and subsequently a faculty horticulturist describes recommendations (2 contacts). Each contact is recorded on a log regularly.</p> <p><i>Each agent keeps a log of educational calls, noting topic of call.</i></p> <p>Not Correct: An automated phone system counts the number of incoming and outgoing phone calls (includes routine operations, office to office, interoffice, and non-educational calls).</p>

Table 1. Definitions and Examples of Extension Contacts.

<p>Educational Contacts and Clientele Contacts</p>	<p>*4. Number of visits to clientele: When visiting a client at their location, record a contact when educational information is transferred to the client. If there is more than one client present, record a contact for each person. Faculty should include counts for program assistants, support personnel, and volunteers under his or her supervision. Faculty may record site visits as clientele contacts if they know the race and gender of site contacts. *Required for the funding formula.</p>	<p>During a visit with one producer, the agent receives an invitation for lunch at the local diner. The agent meets 10 more producers who receive educational information and just talks with 15 more (11 contacts). A County Extension Director attends a meeting with county financial services and talks with 10 people to learn about vendors, deadlines, and personnel issues (0 contacts). An agent visited 25 buyers at a livestock auction in order to build relationships. These were not educational contacts, so the agent made no report.</p>
<p>Educational Contacts</p>	<p>5. Number of group learning events: This is the total number of meetings with a group of clientele in which educational information is disseminated. An event involves the same individuals over a continuous period of time such as an hour, day or week and uses a focused curriculum or educational message. Faculty should include counts for program assistants, support personnel, and volunteers under his or her supervision.</p>	<p>Four seminars are sponsored at the Beef Field Day followed immediately by three related afternoon tours (1 event). Recorded meetings for 50 4-H clubs have shown that they met an average of 9 times each with demonstrations by 4-H members at each meeting (50 clubs x 9 meetings each = 450 events). Note that volunteers conduct the meetings as CES representative. School enrichment projects are taught by teachers who had 4-H training. Returned evaluation forms showed that 25 activities were conducted over 5 consecutive days with varying attendance each day (25 projects x 5 days = 125 events). A 5-day Natural Resources camp has 4 rotations of different topical sessions. One group learning event is reported if campers sleep over because participation is continuous. An FCS agent teaches four different groups of people with four different preps on a Monday morning at a housing development. The agent reports 4 educational events.</p>

Table 1. Definitions and Examples of Extension Contacts.

<p>Educational Contacts and Clientele Contacts</p>	<p>*6. Number participating in group learning experiences: Report the total number of clients present during meetings, seminars, field days, interactive video conferencing, etc. Faculty should include counts of contacts by program assistants, support personnel, and volunteers under his or her supervision. Faculty may record participants of such events as clientele contacts if they know the race and gender of participants. *Required for the funding formula.</p>	<p>4-H co-sponsors "Ag in the Classroom" which have 100 different participants each day for five days. Each child attended 10 30-minute classes taught by 10 teachers (5 days x 100 children x 10 instructors = 5,000 participants). According to records, 50 4-H clubs met 9 times during the year. Total 4-H population is 1000 youngsters. The 4-H agent found that club minutes documented 60% of the members present during most meetings (50 groups x 9 meetings x 1000 participants x 60% = 270,000). Note: club attendance should be documented; estimates should be avoided. A 4-H agent conducts a workshop and gives school enrichment material to elementary teachers. One teacher has 30 students and conducts 3 15-minute lessons on hygiene, healthy lunches and healthy snacks during the day. Because a single curriculum is used, 1 group learning event and 30 participants are reported. Three Master Gardeners co-taught a workshop on making rain barrels to 50 people on three different occasions (3 volunteers x 50 participants x 3 activities = 450). An FCS agent teaches a series of workshops on family budgeting, preparing wills, and purchasing life insurance to 30 county employees. The agent reports 90 participants because the curriculum and individuals attending were different at each workshop (3 events x 30 participants = 90).</p>
<p>Educational Contacts</p>	<p>7. Number of instructional hours: Instruction hours are based on time spent teaching in group learning activities. The amount of instruction hours should be the aggregate amount of time providing instruction to a group. For example, a group learning activity that lasts 3 hours and has 20 participants should be reported as 60 hours of instruction. Do not include preparation time. Faculty should include counts for program assistants, support personnel, and volunteers under his or her supervision.</p>	<p>4-H co-sponsored "Ag in the Classroom," which had 100 children participating each day for five days. Each child was in 10 classes (30 minutes each) taught by 10 different staff members or volunteers (100 students x 5 days x 5 hours = 2,500 hours) An agent teaches four 1-hour lessons during a 3-day 4-H day camp to the same 20 campers (4 hours x 3 days x 20 4-Hers = 240 hours). An agent taught 20 minutes during 15 seminars on "Build Green" to 10 builders (10 participants x 15 meetings x .33 hours = 55 hours). Ten agents organize 10 regional meetings for producers and each one teaches for 15 minutes. An average of 50 producers attend (1/4 hrs. x 10 meetings x 50 producers = 125 instruction hours per agent).</p>

Table 1. Definitions and Examples of Extension Contacts.

Educational Contacts	<p>*8. Number of times mass media was used: Each individual newspaper article written, television show produced, television show appearance, radio broadcast produced, appearance on a radio broadcast, or exhibit in a public location should be counted as one time that mass media was used. Count each instance that a mass media event was developed (e.g., you would count a newspaper article once, even though it may run in two different newspapers). Do not count program announcements. *Required for the funding formula.</p>	<p>Four educational news releases are sent weekly to a media list of 30 print and electronic media with a total population coverage of 250,000 (4 releases x 52 weeks = 208).</p> <p>Not Correct: Four news releases are sent weekly to a media list of 30 print and electronic media with a total population coverage of 250,000. (4 releases x 52 weeks x 30 media sources = 6,240) Any combination multiplied by 250,000. Do not include number of media or circulation.</p>
Educational Contacts	<p>9. Mass media contacts: Mass media contacts refer to large-scale educational exposures via radio, television, or public exhibits. Therefore, the number of mass media contacts should include the circulation of a newspaper each time an article is published. In addition, radio or television shows should include the actual audience as determined by an official rating system such as Arbitron or Nielsen each time a program is aired. Each radio or television station should be able to provide this information. Exhibit viewers also can be counted.</p>	<p>An agent had a five minute broadcast every weekday morning at 7 a.m., which reached 30,000 listeners as shown through the ratings (5 days x 52 weeks x 30,000 Arbitron rating = 7,800,000) An educational video has 4 faculty presenting information. This is distributed to 50 agencies and 5 TV stations. Follow-up calls to the TV stations indicate that the program was aired 5 times by each. Their total viewership is 300,000. (5 TV stations x 5 exposures x 300,000 total viewership = 7,500,000)</p> <p>Not Correct: An agent sends 4 weekly news releases about upcoming programs (no educational information) to 10 media outlets. The agent incorrectly counts 4 releases x 52 weeks x 10 media = 2,080. Count should be zero because no educational information was included.</p>
Educational Contacts	<p>10. Number of web page hits: If your county has a World Wide Web homepage, and this site has an imbedded mechanism for recording "hits," then record that number as "Web page hits."</p>	<p>An agent created an electronic newsletter and Ask the Agent Q & A on the Web. Monthly he receives 1000 hits at the specific website (12 months x 1,000 hits = 12,000 total hits).</p> <p>Not Correct: An agent establishes the office Web page as the default home page on all office computers and checks the Internet 10 times a day. He reports 3000 hits per year on his website (of these, 240 days worked x 10 = 2,400 hits are from the office alone).</p>

Table 1. Definitions and Examples of Extension Contacts.

Educational Contacts	<p>*11. Number of educational materials prepared: An educational material prepared is an original work prepared or modified for local use, such as a fact sheet, circular, or hand-out. It should only be counted once. Copies of educational materials which are distributed to clientele do <i>not</i> count as an educational material prepared; instead these should be counted in #12 or #13, as appropriate. Newspaper articles and radio and television productions are <i>not</i> counted under this category, but rather under number of times mass media is used. *Required for the funding formula.</p>	<p>Four newsletters are jointly authored by 3 faculty and sent to 400 targeted clientele (4 materials prepared by each faculty member). An educational video is prepared with 4 faculty presenting information and distributed to 50 agencies and 5 TV stations (1 material prepared for each faculty member). Fifty-three new horticulture fact sheets were compiled from 8 existing resources and handed out at 5 meetings to over 1,000 people (53 materials prepared).</p> <p>Not Correct: An EDIS fact sheet was minimally modified by a faculty member for use in a monthly newsletter and counted once. Slightly edited work should not be counted.</p>
Educational Contacts and Clientele Contacts	<p>12. Number of direct mailings: Each newsletter, tabloid, or other correspondence (including e-mail) containing educational information addressed to an individual should be recorded as an educational contact. Newsletters and correspondence not mailed to a specific person are not considered a direct mailing, nor are handouts or newsletters left in a public place, such as a shopping mall or county fair. Do not include letters or e-mail messages that are reported under contacts with individuals. Faculty may record recipients of direct mailings as clientele contacts if they know the race and gender of recipients.</p>	<p>Monthly electronic and published newsletters were sent to 650 individuals on a coded mailing list (650 named individuals x 12 months = 7,800) A secretary logs direct mail and newsletters from each staff member. Mailings are recorded in a log as they occur.</p> <p>Not Correct: Newsletter was posted on the web, which had 1,500 hits per month (1,500 hits x 12 months = 18,000). Web hits cannot be used as direct mail.</p> <p>Not Correct: Newsletters distributed to agencies who then copied and redistributed them to 2,000 clientele. Since no addresses for the clientele were available, these should be counted as #13, number distributed other than direct mailing.</p>
Educational Contacts	<p>13. Number of educational materials distributed other than direct mailings: This category includes the total number of copies of materials distributed in meetings and through exhibits, shopping malls and electronic or conventional mail not sent to a specific individual (e.g., addressed to "boxholder").</p>	<p>Monthly newsletters are distributed to agencies who then reproduced and redistributed them to 2,000 targeted clientele (12 issues x 2,000 unnamed clientele = 24,000) Two 4-H projects books were given to 500 members (2 materials x 500 recipients = 1,000). If distributed to an enrollment list, then report as a direct mailing. Only 25 of 500 copies of an educational brochure remained at an unmanned booth in the mall. The agent reported 475 distributed. A horticulture agent was able to convince the local telephone company to include an educational flyer in their billing. Total number distributed was 10,543.</p> <p>Not Correct: An agent sends 3,000 copies of a new fact sheet on parenting to 10 libraries. The agent never inquires about the number picked-up by consumers or discarded by the staff. An effort should be made to determine usage.</p>

Table 1. Definitions and Examples of Extension Contacts.

Educational Contacts	<p>14. Number of volunteers: The number of volunteers (e.g., Master Gardeners, 4-H club leaders, etc.) involved in your extension programs is reported, without duplication.</p>	<p>A 4-H agent works with a county council of 8, a foundation board of 15, 100 4-H volunteers and an advisory committee of 12. She removes the duplicates for a total count of 113.</p> <p>A hort agent has 10 Master Gardeners who also work with 4-H. The 4-H agent and hort agent each report the 10 Master Gardeners.</p> <p>Not Correct: An agent uses meetings with the Farm Bureau Board and the Cattlemen's Association for program direction (15 + 12 = 27). These are not considered volunteers if no formal relationship exists, such as appointment to an advisory committee.</p>
Educational Contacts	<p>15. Number of training hours provided to volunteers: Report the number of hours in which you provided training or orientation for volunteers. Instruction hours are calculated as the number of volunteers multiplied by the number of hours of the training. If volunteers are trained (Master Gardeners, Family & Community Educators, 4-H leaders) on a topic in order to reach other clients and they also apply the information for their personal benefit, then the training should be reported in #5-7, group learning events, number of participants, and instruction hours.</p>	<p>Two 3-hour interest and orientation sessions were held for potential Master Gardeners. The sign in sheet showed 49 at one and 76 at the other (125 total participants x 3 hours).</p> <p>An agent provides 60 hours of Master Gardener training (6 hours a day for 10 weeks), bringing in a guest speaker for a session on marketing (54 hours x number of participants).</p> <p>One hundred 4-H volunteers attend a mandatory leader meeting and most also come to the 2-hour monthly meetings. The 4-H agent taught all sessions (75 participants x 11 meetings x 2 hours = 1,650 + 100 participants x 2 hours).</p> <p>An agent coordinates 60 hours of Master Gardener training (6 hours a day for 10 weeks), with other faculty providing all the subject matter training. The agent should report zero hours because he or she did none of the teaching.</p>
Educational Contacts	<p>16. Number of hours donated by volunteers: Report the total amount of time on educational activities, clerical support, and other educational effort that volunteers spent in support of your Extension programs.</p>	<p>According to records, 50 4-H clubs, each with 2 leaders, met 9 times during the year for an average of 1.5 hours. Total 4-H volunteers hours was 50 clubs x 2 volunteers x 9 meetings x 1.5 hours = 1,350 hours.</p> <p>50 Master Gardeners reported 3,000 hours for Extension-sponsored programs. They spent 10 hours each talking with neighbors and friends about their lawns and gardens. They also planted medians for the Parks & Rec Department for 20 hours each (3,000 hours + 20 x 10 -- avoid including non-Extension programs). Note: If they represent CES for Parks & Rec, then all hours should be counted.</p> <p>FCE volunteers recorded 600 hours in making "ouch dolls" and teaching food safety. They also attended 70 hours of in-service training with the Extension office. Only the 600 hours should be reported as time donated in service. The 70 hours of in-service should be listed in number of training hours by the agent.</p>
Educational Contacts and Clientele Contacts	<p>17. Number of clientele contacts by volunteers: Volunteer contacts should be reported in all appropriate categories above. Data reported in this field is not used for state-level reports. This category is provided for individual or local use.</p>	