



IFAS EXTENSION

Extension Contacts: Definitions and Examples for Unifas¹

Bryan D. Terry and Glenn D. Israel²

The purpose of this fact sheet is to describe how the Unifas software should be used to report Extension 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 Extension contact information on race and gender is used to meet state and federal laws on affirmative action. Also, this data is used by the state of Florida as productivity measures for UF. The productivity measures, referred to as Research Delivery Units (RDU) consists of five (5) elements contained in Unifas. These include the number of publications developed, telephone calls, office visits, visits to clientele, and group attendance. For the purposes of this fact sheet, publications developed will not be discussed.

Extension Contacts

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

- Face-to-face interactions in meetings, workshops, field days, classrooms, clinics, and offices;
- Individual correspondence by letter or telephone;
- Interactive video conference; and
- Newsletters, tabloids, and other direct mail that is sent to individuals who are either included on a mailing list or e-mail list (Taylor and Israel, 1994).

To comply with accountability requirements, Unifas divides extension contacts into two sections, *Clientele Contacts* and *Group Attendance*, within an Extension Program (Figure 1). In addition to the type of Extension contact, classifications for race-ethnicity are defined (Figure 2).

Clientele Contacts

The *clientele contacts* section of Unifas is used to record telephone calls, office visits, client visits, Email, radio/TV, Web site contacts, and other direct

-
1. This document is AEC 377, a publication of the Program Development and Evaluation Center, Agricultural Education and Communication Department, Florida Cooperative Extension Service, Institute of Food and Agricultural Sciences, University of Florida. Original publication date May 2006. Visit the EDIS Web Site at <http://edis.ifas.ufl.edu>.
 2. Bryan D. Terry, coordinator, statistical research, and Glenn D. Israel, professor, Agricultural Education and Communications Department; Florida Cooperative Extension Service, Institute of Food and Agricultural Sciences, University of Florida, Gainesville, FL 32611. The authors wish to thank Larry Arrington, Marilyn Norman, Nick Place, and Doug Mayo for their contributions to this fact sheet.

The Institute of Food and Agricultural Sciences (IFAS) is an Equal Opportunity Institution authorized to provide research, educational information and other services only to individuals and institutions that function with non-discrimination with respect to race, creed, color, religion, age, disability, sex, sexual orientation, marital status, national origin, political opinions or affiliations. U.S. Department of Agriculture, Cooperative Extension Service, University of Florida, IFAS, Florida A. & M. University Cooperative Extension Program, and Boards of County Commissioners Cooperating. Larry Arrington, Dean

Clientele Contact:	Dates	Type	Ethnicity							Gender				
			AI/AN	NH/PI	Asian	HI/LA	Blk	Wh	Unk	Tot	M	F	Unk	Tot
Add/Edit/Delete														
Group Attendance:	Activity	AI/AN	NH/PI	Asian	HI/LA	Blk	Wh	Unk	Tot	M	F	Unk	Tot	
Add / Edit / Remove														

Figure 1. Clientele Contacts and Group Attendance sections of an Extension program in Unifas.

American Indian or Alaska Native (AI/AN). A person having origins in any of the original peoples of North and South America (including Central America), and who maintains tribal affiliation or community attachment.

-- **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 (Blk).** A person having origins in any of the black racial groups of Africa. Terms such as "Haitian" or "Negro" can be used in addition to "Black or African American."

-- **Hispanic or Latino (HI/LA).** A person of Cuban, Mexican, Puerto Rican, Cuban, South or Central American, or other Spanish culture or origin, regardless of race. The term, "Spanish origin," can be used in addition to "Hispanic or Latino."

-- **Native Hawaiian or Other Pacific Islander (NH/PI).** A person having origins in any of the original peoples of Hawaii, Guam, Samoa, or other Pacific Islands.

-- **White (Wh).** A person having origins in any of the original peoples of Europe, the Middle East, or North Africa.

Figure 2. Race-ethnicity classifications.

mail contacts. Clientele contacts are recorded in the Extension module of Unifas for each program. Federal affirmative action rules require clientele contacts to be recorded by ethnicity and gender categories. Unifas contains the categories for ethnicity and gender identification (Figure 3). It is also understandable that many clientele contacts cannot be identified by race-ethnicity and gender. Unifas provides an 'Unknown' (Unk) category to enter clientele contacts where ethnicity and/or gender cannot be determined. For example, race-ethnicity and/or gender identification from telephone calls is often difficult to determine. Use the "Unk" fields for these entries. When inputting clientele contacts into Unifas, the totals for race-ethnicity and gender must be equal. Unifas will display an error message if this requirement is not met.

A faculty member also is responsible for reporting clientele contacts for program assistants, support personnel, and volunteers that he/she supervises. Clientele contacts must be input into Unifas on an annual basis; however, it is recommended that clientele contacts be input into Unifas on a monthly basis. For frequently asked questions related to clientele contacts, refer to the FAQ section of this fact sheet.

Example 1: A horticulture agent has four Extension Programs. The agent will need to report the number of telephone calls, office visits, client visits, Email, radio/TV, Web site and direct mail contacts for each program. In addition, the agent will need to report the telephone calls, office visits, client visits, Email, and Radio/TV contacts for any program assistants, support staff, or volunteers such as Master Gardeners.

Example 2: An agent receives 50 telephone calls from other agents and state specialists in one year. In this example, no clientele contacts will be recorded. Only contacts from clientele are recorded in Unifas.

Table 1 provides some other examples for entering clientele contacts.

Group Attendance

Group attendance is a specific type of clientele contact and is recorded in Unifas at the activity level of an Extension program. Group attendance refers to the number of Extension clientele present in group settings. Group attendance is one of the five productivity measures used for UF during the state budget process.

Group attendance should only be recorded in Unifas when the activity type is one of the following:

- Advisory Council meetings

Program Contact Log													
Dates	Type	Ethnicity						Gender					
		AI/AN	Asian	HI/LA	Blk	Wh	Unk	Tot	M	F	Unk	Tot	
Add													
Start Date: <input type="text"/>		End Date: <input type="text"/>											
Type:		<input checked="" type="radio"/> Telephone <input type="radio"/> Office Visit <input type="radio"/> Client Visit <input type="radio"/> Email <input type="radio"/> Radio/TV <input type="radio"/> Web Site											
		AI/AN	Asian	HI/LA	Blk	Wh	Unk	Tot					
								0					
		M	F	Unk				Tot					
								0					
Save Cancel													

Figure 3. Data entry screen for Clientele Contacts.

- Classroom Enrichment (4-H)
- Clinics
- County Event
- Demonstration/Field Trials
- District Event
- Field Days
- Group Teaching Events
- State/National Event
- Video Conference
- In-Service Training*

*In-service training is a special case of group attendance, where agents train program assistants or specialists train agents. Report this group attendance in an Extension program activity with “*In-Service Training*” as the activity type (Figure 5).

Federal affirmative action rules require group attendance contacts to be recorded by race-ethnicity and gender categories. Unifas contains the categories for race-ethnicity and gender identification (Figure 4). Unifas provides an 'Unknown' (Unk) category to enter group attendance where ethnicity and/or gender cannot be determined. When inputting group attendance into Unifas, the totals for ethnicity and gender must be equal. Unifas will display an error message if this requirement is not met.

Faculty are responsible for providing a sign-in log for all Extension clientele participating in group settings. The sign-in log should contain the name and date of the event together with space provided for clientele to enter their name, address, ethnicity, and gender. It is also understandable that participants will not enter all of the information on a sign-in log. There is no requirement for participants to provide this information.

Example 1: An Extension agent meets 4 times with an advisory council. Report each date that the advisory council met and the group attendance by race-ethnicity and gender (Figure 4).

Example 2: A specialist conducts in-service training for 32 Extension agents, paraprofessionals, and staff. Report **group attendance of 32** in an Extension program activity with an *Activity Type* of “In-Service Training” (Figure 5).

Table 2 provides some other examples for entering group attendance.

Frequently Asked Questions

Who is responsible for reporting?

In accordance with Title VI of the 1964 Civil Rights Act, USDA regulations require that each Extension employee involved in the delivery of educational programs is responsible for reporting Extension contacts across ethnic and gender lines. This means that both professionals and paraprofessionals who are working with the public are required to keep a record of Extension contacts (Taylor and Israel, 1994).

Activity For:	Strengthening 4-H in Florida Goal 3 Team									
Activity Name:	2005 State 4-H Advisory Council Meetings									
Activity Type:	Advisory Council									
Activity Coordinator:	Terry, Bryan Daniel									
Audience:	Potential: Targeted:									
	<input type="button" value="Edit Activity Basic"/>					<input type="button" value="Delete Activity"/>				
Target/Primary Audiences:	Target					Primary				
	Advisory Committee					Extension Advisory Committees				
	<input type="button" value="Add / Edit / Delete"/>									
Topics/Subjects:	Topic		Subject							
	Marketing		Public Awareness of the Role of 4-H in Youth Development							
	<input type="button" value="Add / Edit / Delete"/>									
Start/End Dates:	Start Date			End Date			Confirmed			
	01/01/2005			12/31/2005			False			
	<input type="button" value="Add / Edit / Delete"/>									
Activity Days:	Person		Self/Staff/Vol		Days Planned		Days Expended			
	Terry, Bryan Daniel		self		0		10.0			
	<input type="button" value="Add / Edit / Delete"/>									
Resource Assistance:	Requester	Faculty Requested		Support Requested			Need By		Confirmed	
	<input type="button" value="Add / Edit / Delete"/>									
Group Attendance:	Date	AI/AN	Asian	HI/LA	Blk	Wh	Unk	M	F	Unk
	02/01/2005	1	1	1	1	1	0	1	4	0
	05/01/2005	1	1	1	1	1	0	1	4	0
	07/01/2005	1	1	1	1	1	0	1	4	0
	10/01/2005	1	1	1	1	1	0	1	4	0
	<input type="button" value="Add / Edit / Delete"/>									
Materials Distributed:	Title		Type			# Distributed				
	<input type="button" value="Add / Edit / Delete"/>									
Volunteer Participation:	Volunteer Category			Unit		Volunteer Type			# Volunteers	
	<input type="button" value="Add / Edit / Delete"/>									
	<input type="button" value="Program"/>									

Figure 4. Advisory Council Activity displaying Group Attendance in Unifas.

What is an Extension Contact?

The Florida Cooperative Extension Service defines an Extension contact as having an intention to convey educational information (Taylor and Israel, 1994). Unifas provides two sections within an Extension program to record Extension contacts. **Clientele contacts** include *telephone calls, office visits, visits to clientele, letters/email, radio/tv, and web site contacts*. These contacts are recorded at the

Extension program level. **Group attendance** refers to the Extension clientele present in group settings. These contacts are recorded at the *Activity* level of an Extension program.

How often should I report Extension contacts?

It is recommended that clientele contacts and group attendance be recorded monthly in Unifas. Unifas allows users to enter information as often as needed.

How do I report In-Service Training that I conduct for other Extension professionals and paraprofessionals?

Create an activity in the most appropriate Extension program and select “In-Service Training” as the activity type.

How should I report contacts where the subject matter I am teaching crosses two or more Extension programs?

Make a judgment call and record the contacts in one Extension program or split the contacts among multiple Extension programs.

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

The recommended procedure for maintaining accurate clientele contacts is to keep a monthly log of *telephone calls, office visits, visits to clientele, letters/email, radio/tv, and web site contacts* close to your telephone for easy access. Doug Mayo of Jackson County Cooperative Extension has created an Extension contact log to keep track of his clientele contacts. We have an adapted version of this log and it is available at: <http://pdec.ifas.ufl.edu/contactlog>.

As for *Group Attendance*, a sign-in sheet is required for all participants of group events. The sign-in sheet should contain the title and date of the event, the participant name, address, ethnicity, and gender. A group event log is available at: <http://pdec.ifas.ufl.edu/contactlog>.

References and Further Information

Mayo, D. E. 2000. *Contact Calculator 1.0*. Marianna, FL: UF Jackson County Extension.

Norman, M. and G. D. Israel. 2001. *Extension Contacts: Definitions and Examples*. UF/IFAS EDIS publication AEC 362.

Taylor, C. L. and G. D. Israel. 1994. *Guidelines to Reporting Extension Clientele Contacts*. UF/IFAS EDIS publication PE-50.

U. S. Executive Office of the President, Office of Management and Budget. 1997. *Revisions to the Standards for the Classification of Federal Data*

on Race and Ethnicity. Washington, D.C.:

Available at:

<http://www.whitehouse.gov/omb/fedreg/1997standards.html>

Activity For:	Strengthening 4-H in Florida Goal 3 Team		
Activity Name:	2005 Fall 4-H In-Service		
Activity Type:	In-Service Training		
Activity Coordinator:	Terry, Bryan Daniel		
Audience:	Potential: Targeted:		
	<input type="button" value="Edit Activity Basic"/> <input type="button" value="Delete Activity"/>		
Target/Primary Audiences:	Target		Primary
	Extension Faculty		County Extension Directors
	Extension Faculty		County Extension Faculty
	<input type="button" value="Add / Edit / Delete"/>		
Topics/Subjects:	Topic		Subject
	Resource Management		Staff Training and Development
	<input type="button" value="Add / Edit / Delete"/>		
Start/End Dates:	Start Date	End Date	Confirmed
	10/01/2005	10/31/2005	False
	<input type="button" value="Add / Edit / Delete"/>		
Activity Days:	Person	Self/Staff/Vol	Days Planned
	Terry, Bryan Daniel	self	2.0
	<input type="button" value="Add / Edit / Delete"/>		
Resource Assistance:	Requester	Faculty Requested	Support Requested
	<input type="button" value="Add / Edit / Delete"/>		
Group Attendance:	Date	AI/AN	Asian
	10/20/2005	0	0
	HI/LA	Blk	Wh
	2	5	25
	Unk	M	F
	0	10	22
	Unk		
	0		
	<input type="button" value="Add / Edit / Delete"/>		
Materials Distributed:	Title		Type
	2005 POW Requirements		Fact Sheet
			# Distributed
			32
	<input type="button" value="Add / Edit / Delete"/>		
Volunteer Participation:	Volunteer Category	Unit	Volunteer Type
			# Volunteers
	<input type="button" value="Add / Edit / Delete"/>		
	<input type="button" value="Program"/>		

Figure 5. Reporting Group Attendance for In-Service Training.

Table 1. Common situations for counting clientele contacts.

Situation	Number of Contacts	Where to Report in Unifas	Radio Button
In response to a telephone call, a secretary reads part of an educational pamphlet to the client and subsequently a faculty horticulturalist describes recommendations.	2	Clientele Contacts	Telephone
An automated phone system counts the number of incoming and outgoing phone calls.	0	Not Reported	
A secretary gives an educational pamphlet to a client who visits the Extension office and subsequently a faculty horticulturalist describes recommendations.	2	Clientele Contacts	Office visit
A Secretary maintains a log of each person who walks through the Extension office	0	Not Reported	
A faculty member sends educational information by email and then stores the email in a separate email folder	1	Clientele Contacts	Email
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.	11	Clientele Contacts	Client Visit
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	Not Reported	
An agent visited 25 buyers at a livestock auction in order to build relationships.	0	Not Reported	
An agent had a five minute broadcast every weekday morning at 7 a.m., which reached 30,000 listeners as shown through the ratings.	7,800,000	Clientele Contacts	Radio

Table 2. Common situations for counting group attendance.

Situation	Number of Contacts	Where to Report in Unifas
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	Report contacts in the Group Attendance section of the most appropriate activity of an Extension program.
According to 4- H club records, a 4-H club met 9 times during the year. Club minutes document that total participation at the 9 club meetings was 205. Note: club attendance should be documented; estimates should be avoided.	205	Report contacts in the Group Attendance section of the most appropriate activity of an Extension program.
Three Master Gardeners taught a workshop on making rain barrels to 50 people on three different occasions. (3 volunteers x 50 participants x 3 activities).	450	Report contacts in the Group Attendance section of the most appropriate activity of an Extension program.
An agent determines that 400 of the 500 newsletters placed at an Extension fair booth were distributed.	0	Do not report Newsletters distributed as group attendance.
Total fair attendance at the county fair is determined to be 9,500.	0	Do not report fair attendance. Attendance at a county fair is not in itself an Extension contact.

Table 2. Common situations for counting group attendance.

Situation	Number of Contacts	Where to Report in Unifas
An FCS agent teaches a series of 3 workshops on family budgeting, preparing wills, and purchasing life insurance to 30 county employees. (3 events x 30 participants).	90	Report contacts in the Group Attendance section of the most appropriate activity of an Extension program.
Two agents teach to a group of 90 participants of a pesticide safety workshop for 1 hour each. The agents are not part of a team program.	90	Each agent should report contacts in the Group Attendance section of the most appropriate activity of an Extension program.
Two 4-H agents teach a group of 100 volunteers in providing safe and secure learning environments for youth. This is a "Team" program and both agents are listed in the Personnel section of the Extension program.	100	Report contacts in the Group Attendance section of the most appropriate activity of an Extension program. Each agent should have days expended for the activity in the <i>Activity Days</i> section. This will insure that each agent gets credit for the contacts.