UF IFAS Extension UNIVERSITY of FLORIDA

AEC377

Reporting Clientele Contacts in *Workload*[1]

Diane D. Craig and Glenn D. Israel[2]

Each fall UF/IFAS faculty are asked to report on their Extension activities and accomplishments over the past year. One aspect of this reporting is the contact made with Extension clientele through direct methods, such as workshops or visits to a client's farm, or indirect methods, via printed materials or the internet. For our purposes, anyone in the community who receives educational information from UF/IFAS faculty is considered an Extension client. Students who receive this information as part of their undergraduate or graduate education, as well as faculty colleagues or other academic professionals who receive this information as part of their jobs, are not considered Extension clientele.

While faculty are required to report these same data in their Report of Accomplishments (ROA), the purpose of this fact sheet is to describe how to report Extension clientele contacts in the Workload online system. Compliance and accuracy in reporting these contacts in Workload is very important because UF/IFAS uses this information to submit an annual federal report that is required in order to receive our federal Capacity funding (e.g., Smith-Lever, Hatch Regular).

The clientele contact data that faculty submit in Workload also serve as productivity measures, referred to as Research Delivery Units (RDU), which are used to gain additional state funds for the UF/IFAS research, teaching, and Extension missions. RDUs are based on aggregate data for all UF/IFAS faculty and do not contain individual faculty detail. Likewise, the Extension Annual Report and yearly County Economic Impacts also utilize combined counts of clientele contacts. Individual-level data is provided to district and county Extension directors each year and to department chairs and Extension deans upon request. These data may also be considered during departmental and county program reviews.

Although providing educational information to the community is most common among Extension faculty, it does occasionally occur among those who have no Extension appointment. This is why all faculty—regardless of appointment—are asked to provide their clientele contact data in Workload.

Clientele Contacts

Florida Extension, which includes both the University of Florida and Florida A&M University, defines an *Extension contact* as an interaction with the intention to convey educational information and classifies the following as legitimate, reportable contacts:

- individual consultations in the field or the office;

1. This document is AEC377, a publication of the Program Development and Evaluation Center, Department of Agricultural Education and Communication, UF/IFAS Extension. First published May 2006 as *Extension Contacts: Definitions and Examples for Unifas*. Revised for November 2009 publication as *Reporting Clientele Contact in Workload*. Revised October 2016. Visit the EDIS website at http://edis.ifas.ufl.edu.

2. Diane D. Craig, coordinator, statistical research, Program Development and Evaluation Center; and Glenn D. Israel, professor, Department of Agricultural Education and Communications; UF/IFAS Extension, Gainesville, FL 32611. The authors wish to thank Larry Arrington, Marilyn Norman, Nick Place, and Doug Mayo for their contributions to this fact sheet.

- face-to-face interactions in group meetings, workshops, field days, classrooms, and clinics;
- individual correspondence by letter, email, telephone, or other electronic methods such as texting, instant messaging, YouTube, social media sites, software applications, mobile apps, etc.;
- interactive video conference;
- distance learning, including those hosted in Canvas or ECES and Elluminate and Articulate classes posted online;
- diagnostic services;
- volunteer training or orientation;
- web visits.

Educational Materials

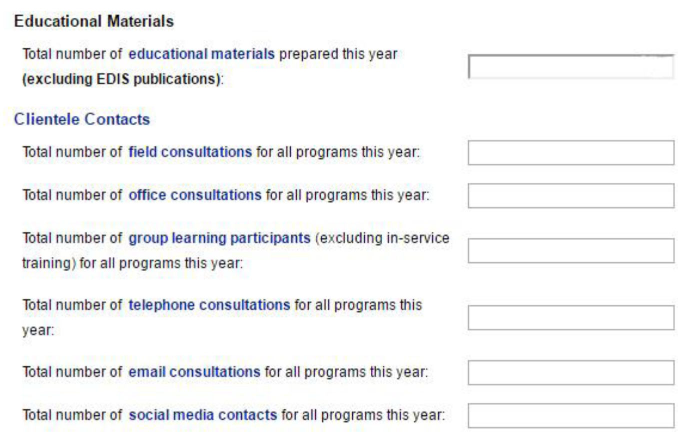
The creation of educational materials and publications for a non-credit/non-academic audience is also considered a type of contact. Florida Extension defines an educational material as an original work prepared or modified to communicate research-based educational information to others. A major revision may be counted as an educational material but minor revisions should not.

This category of clientele contact includes written materials (e.g., fact sheet, circular, handout, newspaper article, book and book chapters, research report, brochure, slide set, newsletter, exhibit, poster, curriculum guide, etc.) as well as electronic materials (e.g., web page or site, blogs, wikis, social networking sites, curriculum created for online community education classes, CD/DVDs, audio or video podcasts, TV or radio broadcasts, YouTube, etc.). In Workload, do not include refereed or EDIS publications in your educational material counts—we collect these separately.

Faculty should report each original work one time. In other words, the same article should only be counted once regardless of how many times it is published or where it is published (e.g., website, SMS email, hand-delivered). While you will want to report the dissemination of the educational materials in your ROA (i.e., newsletter or SMS subscribers, radio listeners, TV audience, etc.) this information is not captured in Workload. However, if you provide the newsletter as a response to an inquiry from a client, then it is counted as a clientele contact (i.e., email or phone consultation).

Each author should report his or her own work, and the faculty member who assembles and organizes an issue should also count his or her work as an educational material. When the *publication* is a newsletter or contains multiple articles, it can be difficult to determine whether it is counted as a single educational material or multiple ones. When the articles are lengthy, detailed, and/or there are multiple authors, then it should be broken out to its individual parts. This is a judgment call that each author/editor should make based on how much new work and information went into the article.

In summary, if you produced any written or visual materials for a non-student/non-academic audience or had any contact with the general public or members of the community to convey educational information about your research, teaching, or Extension program, you should enter the data in the Workload Reporting Categories section shown below, regardless of whether you have an Extension appointment (see Figure 1).


Educational Materials

Total number of educational materials prepared this year (excluding EDIS publications):

Clientele Contacts

Total number of field consultations for all programs this year:

Total number of office consultations for all programs this year:

Total number of group learning participants (excluding in-service training) for all programs this year:

Total number of telephone consultations for all programs this year:

Total number of email consultations for all programs this year:

Total number of social media contacts for all programs this year:

Figure 1. Screenshot of the Workload Reporting Categories section in Workload.
Credits: UF/IFAS Program Development and Evaluation Center

Web Visits

Web visits are counted as an Extension contact but are not found in Workload (as of 2015). To avoid duplicated counts (i.e., many faculty counting the same shared website), the UF/IFAS Program Development and Evaluation Center (PDEC) collects this information annually from several UF/IFAS websites using Google Analytics. Sites include Solutions for Your Life, EDIS publications, IFAS News, and IFAS Blogs—all designed for an external audience to obtain educational information. A web visit begins when a person enters the website and ends when they leave the site or the session closes automatically after a specified period of inactivity (typically 30 minutes). In the federal report, web visits are treated as indirect clientele contacts.

The creation of a new web site or web page, or the significant revision of one, is counted as an educational material.

Social Media

In 2015, a new category of clientele contacts was added to Workload in order to capture consultations through social media outlets like Facebook, YouTube, and Twitter. In the past, faculty have reported educational consultations conducted through social media and other electronic technologies, such as text messaging, mobile apps (e.g. iPEST1), instant messaging, blogs, and other electronic sources of communication, as an *email contact* or *web visits*. Given the difficulty of tracking such correspondence and the analytics available from many social media sites, many felt we needed a dedicated category to this growing area of communication and outreach. For Workload, we count Facebook post views, likes, comments, shares, and clicks; for Twitter, favorites or retweets; for YouTube, views, comments, shares, and favorites added. We do not count Facebook "friends" or Twitter "followers" or YouTube "subscribers" as a clientele contact for the same reason we do not count newsletter subscribers or a TV/radio audience: they are a form of mass communication, whereby the potential audience is known but not the actual number of users.

With regard to blogs and wikis, the content you produce is considered an educational material; whereas, the exchange of information on a particular issue or problem with an individual using the comments section is counted as a social media contact. If you have created a Facebook post that is an extensive piece (or a series of substantive posts on a specific topic), then you may want to count it as an educational material. If you provide educational information on another person's blog or wiki, that can be counted as a social media contact or as an educational material, depending on the amount of information and work that goes into the response. You will need to make that decision.

Specific instructions on how to count Facebook, Twitter, YouTube, and blog activity are available online in the Workload FAQ. Guidance on other social media sites and tools will be added as needed.

Faculty who have apps or programs available to Extension clientele should include the number of downloads, purchases, or users in social media contacts. For YouTube and similar outlets, count the number of downloads of your video.

Group Attendance

Group learning participants is a specific type of clientele contact and refers to the number of Extension clientele present in a group setting. The following activities are to be included in this category in Workload:

- Advisory Council meetings
- 4-H in the Classroom
- 4-H Clubs and Special Interest Groups
- Day Camps/Residential Camps
- Clinics
- County Events
- Demonstration/Field Trials
- District Events
- Field Days
- Group Teaching Events
- State/National Events
- Video Conferences or Webinars
- Distance or Online Learning

Faculty have the most difficulty counting group contacts because Extension programs often involve clientele coming to several classes or workshops taught by multiple faculty members. We have created a set of examples that address a wide variety of situations; this is the best reference for deciding how to count clientele contacts for group events and other types of contact. If you find these examples do not address your particular situation, please let PDEC know so we can update this site.

In-Service Training (IST) is a special case of group attendance where agents train program assistants or specialists train agents. Report this group attendance in your ROA but do not include in Workload.

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 with space provided for clientele to enter their name, address, ethnicity, and gender. It is also understandable that some participants will not enter all of the information on a sign-in log. There is no requirement for participants to provide this information.

Race and Ethnicity

Federal affirmative action rules require clientele contacts to be recorded by Extension faculty and paraprofessionals using specific race/ethnicity and gender categories. UF/IFAS developed the Workload application in 2008 with the goal of requesting from faculty only those data that are essential to fulfilling federal and state reporting requirements and cannot be acquired elsewhere. For this reason, all affirmative action data are collected and maintained by the individual faculty member and not reported in Workload. State and county faculty must maintain clientele contacts data by race/ethnicity and gender for Affirmative Action reports (and federal audit purposes) each year, but these data are not required for the reports submitted by UF/IFAS Extension. For more information about affirmative action requirements, visit the District Extension Directors (DED) website on Affirmative Action Basics.

The recommended procedure for maintaining accurate clientele contacts is to keep a monthly log of telephone calls, office visits, visits to clientele, letters/email, group participants, and social media contacts close to your telephone for easy access. Doug Mayo of UF/IFAS Extension Jackson County created an Extension contact log to keep track of his clientele contacts by race/ethnicity. We have an adapted version of this log and it is available at http://pdec.ifas.ufl.edu/Workload/Clientele_Contacts_Log.xls.

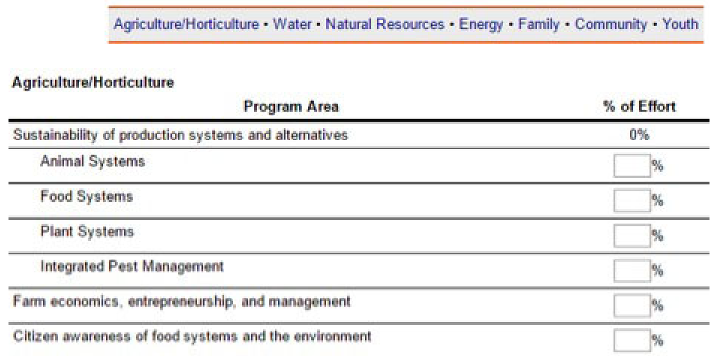
You can enter contact information into Workload as often as you would like, but you will need to keep track of the totals yourself. The system does not calculate a cumulative total each time you enter data. We have added a "Last Updated:" field to help you remember where you left off. You may also view or change any information you reported in prior years by using the drop-down menu in the upper right-hand corner of the Workload application.

Clientele Contacts Made by Others

A faculty member is responsible for reporting clientele contacts for program assistants, support personnel, and volunteers that he or she supervises. If you have other individuals, who are not UF faculty, making contact with clientele on behalf of your program(s), you must include their contacts, volunteers, and educational materials in your Workload figures.

Extension Roadmap

Federal reporting requires UF/IFAS to report clientele contacts by programmatic areas. To do this, faculty *who have an Extension appointment* are required, via Workload, to report their Extension effort in one or more of the priority work groups, which are grouped into seven statewide initiatives. These initiatives represent the current Extension strategic plan, called the Extension Roadmap, and the organizational structure for all Extension activities. (see Figure 2).



Agriculture/Horticulture • Water • Natural Resources • Energy • Family • Community • Youth

Agriculture/Horticulture

Program Area	% of Effort
Sustainability of production systems and alternatives	0%
Animal Systems	%
Food Systems	%
Plant Systems	%
Integrated Pest Management	%
Farm economics, entrepreneurship, and management	%
Citizen awareness of food systems and the environment	%

Figure 2. Screenshot of the Initiative 1 Program Categories section in Workload.
Credits: UF/IFAS Program Development and Evaluation Center

Because we do not collect clientele contacts at the programmatic level in Workload, for reporting purposes, the percentage effort in each focus area is then multiplied by each Workload reporting category (i.e., office consultations, group learning participants, educational materials, email consultations, etc.). For example, if a faculty member reports 100 total phone calls and has entered a 30% effort in the Water Resources priority work group this will be counted as 30 phone calls for Water Resources programs. This gives an approximate number of clientele contacts and publications per priority work group and initiative, which is sufficient for our federal reporting requirements.

Faculty should estimate the time spent on Extension programming related to a particular priority work group when filling in programming percentages in Workload. In short, this is a rough breakdown of where you spend all of your Extension programming time. The total should add up to 100%. An Extension program you offer *may* cut across many priority work groups. For example, if you are teaching water conservation to 4-H'ers, you will have spent time in both the Water Conservation and Youth Development priority work group. How much of your time is in each is usually best answered by asking yourself "What is the main objective of this program—teaching children life skills or teaching about water conservation?" In other words, if your main emphasis is teaching children, then a larger proportion of your programming effort and outcomes and impacts should be reported under 4-H. You should indicate some effort in the Water Conservation team but you are not obligated to report outcomes and impacts.

Guidelines for Counting Clientele Contacts

Below are some general guidelines on how and when to count clientele contacts. We highly recommend that you review the specific, situation-based examples available online at http://pdec.ifas.ufl.edu/Workload/examples.shtml prior to reporting contacts. These instructions serve as a guide—use your best judgment for your own situation or discuss with your county or district Extension director, department chair, or center director.

- Research-based, educational information must be provided to the client. A Facebook post that announces a 4-H event is not a clientele contact.
- Your students and faculty, from any institution, are not clients unless they come to you as a homeowner/citizen.
- Out-of-state attendees or citizens, as well as community organizations and agency representatives, are considered Extension clientele.
- Faculty should count the clientele contacts made by their staff and volunteers.
- Field or office consultations are generally one-to-one meetings; a group event involves multiple participants and is typically more formal and organized (i.e., having an agenda, speakers, handouts, etc.).
- Each faculty member counts their own contacts in a jointly held program, workshop, etc.
- A series of emails, texts, phone calls, comments, etc. on a single topic counts as one clientele contact.
- Diagnostic services should be counted as an office or field consultation if you are providing educational information in addition to the factual data.
- The creation of a written, audio, or visual work should be counted as an educational material if it is an original work or a significant revision of existing work.

For more information about how and what to report in Workload, please review the Frequently Asked Questions (FAQ) on the login page, in the left-hand menu, or contact PDEC at 352-274-1997.

References and Further Information

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

Terry, B. D. and G. D. Israel. 2006. *Extension Contacts: Definitions and Examples*. AEC377. Gainesville: University of Florida Institute of Food and Agricultural Sciences.

Norman, M. and G. D. Israel. 2001. *Extension Contacts: Definitions and Examples*. AEC 362. Gainesville: University of Florida Institute of Food and Agricultural Sciences.

Taylor, C.L. and G.D. Israel. 1994. *Guidelines to Reporting Extension Clientele Contacts*. PE-50. Gainesville: University of Florida Institute of Food and Agricultural Sciences.

Federal Register notice of Department of Education's *Final Guidance on Maintaining, Collecting, and Reporting Racial and Ethnic Data to the U.S. Department of Education*. 2007. Washington, DC: Available at: http://edocket.access.gpo.gov/2007/pdf/E7-20613.pdf

US Department of Education. 2008. *Policy Questions on the Department of Education's 2007 Guidance on Collecting, Maintaining and Reporting Data by Race or Ethnicity*. Washington, DC: Available at http://www2.ed.gov/policy/rschstat/guid/raceethnicity/questions.html