

## Extension Contacts Reporting Fact Sheet

### Purpose of Extension Contacts Reporting

University of Missouri (MU) Extension 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, MU Extension is required to comply with USDA Civil Rights nondiscrimination policies, rules, and regulations. Specifically, MU Extension 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 Missourians with our educational programs.

### Direct and Indirect Contacts

MU Extension collects both direct and indirect educational contacts in myExtension. This enables us to summarize data by program and by calendar and fiscal year.

A **Direct Contact** refers to 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 University of Missouri Extension is carried out. Programs delivered through videoconferencing (Zoom, Microsoft Teams, etc.) that include two-way interaction between the presenter(s) and audience may be reported as direct contacts. Canvas courses delivered asynchronously and have a learning assessment may be counted as direct contacts.

Consultation phone calls, emails, office visits, or field/business visits can be reported as direct contacts when there is an exchange of educational information. You may use the person's demographic data you

collected from a previous exchange, otherwise report as unknown. Do not ever report based on your own visual analysis of someone.

**Direct Contacts** are reported by race, ethnicity, and gender using the following designations:

#### Race

- **American Indian or Alaskan Native.** A person having origins in any of the original peoples of North America, South America, or Central 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

#### Ethnicity

- **Hispanic or Latino Ethnicity.** A person of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish culture or origin, regardless of race.

#### Gender

- Female, male, other/unidentified

Federal guidelines for the collection of gender, ethnicity, and race data only allow for program participant self-reporting. The MU Extension [Voluntary Demographic Form](#), can be used to collect this data. Youth (<18) gender, ethnicity, and race data may only be reported by a parent or legal guardian.

An **Indirect Contact** refers to the distribution of information and resources, including any mass communications, community events, news articles, and materials distributions that are not considered direct education by which an Extension faculty/staff member engages a client in educational content. Those indirect means include:

- **Contacts by Newsletters** – Report the total number of newsletters distributed in support of an

educational topic. (The number of issues multiplied by the number of people sent the newsletter.)

- Contacts through social media (Facebook, Twitter, Pinterest, etc.) should be counted as indirect contacts. If age group information cannot be determined, then list these contacts as “unknown age”.
- Contacts through electronic delivery (YouTube, Zoom, Microsoft Teams, etc.) of a program, without live interaction, such as recorded presentations, should be counted as indirect contacts.

Like direct contacts, indirect contacts are also reported by age. The categories for reporting age are youth (<18) or adult (18 and over).

## 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. MU Extension is only interested in collecting educational contacts. An educational contact with a client should reflect the MU Extension Mission: *Our distinct land-grant mission is to improve lives, communities and economies by producing relevant, reliable and responsive educational strategies that enhance access to the resources and research of the University of Missouri.* 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 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.

## Who Is Required to Collect and Report Contacts?

All people employed with MU Extension and those who volunteer for MU Extension, who have contact with clientele for the purpose of educational delivery, are required to *collect* clientele contact data. Table 1 (see page 3) lists groups of staff members who must *collect* contacts and how those groups are to *report* their contacts.

Contacts reporting is conducted through the myExtension reporting system found on the MU Extension Intranet (<https://extensionapps.missouri.edu/MyExtension/>). In order for employees to report contacts, they must have an active University of Missouri user id and password.

## Contacts Reporting Policies and Guidelines

- Direct and Indirect Contacts must be reported by myExtension or other reporting program at least monthly.
- More than one contact with the same individual during a single day can occur if the individual participates in different educational sessions.
- More than one activity can sometimes be combined into a single contacts record. For example, you may combine all your farm visits or 4-H club meetings into one monthly summary record if all pertain to the same named 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-

**Table 1. Contact Reporting**

<b>Staff Who Must Collect Contact Data</b>	<b>How Staff Members Report Contact Data</b>
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
Volunteers in all program areas	Must provide contact data to the VCE staff member for whom they are volunteering

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 (State Specialist to Field Specialist, Field Specialist to Field Specialist, Field Specialist 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 Program Area. These records will be given to the appropriate Extension faculty member who should report these contacts under the applicable named 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.
- All MU Extension 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.
- All paper records of contacts data must be retained for a period of three years from the date of record. This includes hard copies 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 MU Extension Contacts Reporting system because the individuals with whom information was exchanged cannot be effectively identified or quantified. You may still enter these efforts under Extension Teaching and when reporting choose the “Media” contact method.

## 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 myExtension 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 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 an in-person, telephone, or online conversation, class, or 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 Show Me Select sales, the place of the “Cooking Matters” 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.

*Indirect education is the distribution of information and resources, including any mass communications, community events, news articles, and material distributions that are not considered direct education. Can you give some specific examples of what is and what is not included as an indirect contact?*

Indirect activities may include: a fair, a recruiting event, social media, newsletters, videos, publications, podcasts, columns, news releases, articles, or a short presentation about what MU Extension offers. Indirect activities can also be educational materials that you’re providing, but you’re not promoting them directly to participants. It might be a newsletter, website article or a journal article that has educational material in it, but you’re not providing that education directly, and it’s not part of a curriculum or objectives. 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 Program Areas?*

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

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

First, since the contacts are “direct,” demographic data is required. It is suggested that you create a roster of all 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. If all the classroom programs fit the same Named 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 makeup 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 myExtension data used?*

The myExtension data is useful in providing information about clientele participation in MU Extension 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.