

## Counting and Reporting Educational Materials and Educational Contacts

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**Why report your data?** Data reported through UF/IFAS Workload is required for federal Capacity funding and to calculate productivity measures that are used to gain additional state funds for UF/IFAS. These data also assist in communicating with key clientele and local officials to maintain operational and salary dollars at the county level. As illustrated in this [infographic](#), Workload data are used for various Extension annual reports, County Economic Impact fact sheets, program reviews, and other ad hoc requests.

Workload data are similar but not directly comparable to those reported in the Extension Agent Report of Accomplishment (ROA) because they serve different purposes. Workload is used to summarize our work within the community at a statewide level. The ROA is used to report a faculty member's entire body of work for the year. Some agents, such as SSAs, RSAs, and CEDs, may teach other agents or meet with stakeholders and need to capture that work for their ROA but not for Workload. Other differences on how to count educational contacts in Workload vs. the ROA are discussed below.

**Who is an Extension Client?** Anyone in the community who receives educational information from UF/IFAS is an Extension client. For Workload reporting, do not include college students or faculty colleagues as Extension clientele (e.g., participants in an IST), because Workload data are used to measure our outreach into Florida's communities. Faculty, but not students, may be included in your ROA.

**What is an Educational Material?** An original creative work or publication prepared or modified to communicate research-based educational information to *Extension clients*, as defined above.

- A major revision may be counted as an educational material, but minor revisions should not.
- Following [EDIS guidelines](#), a revision is considered major if there is significant content change (20% rule) and it includes impactful changes such as new research or recommendations. In some cases, academic content needs peer review. If it is difficult to determine, then it is most likely a minor revision.
- Do not include EDIS publications in Workload reporting as we collect those data directly from EDIS (but do include in your ROA). UF/IFAS reports an unduplicated, statewide count of EDIS (new or major revisions only) to the federal government each year.
- Each educational material is only counted one time, no matter how many times it is published or distributed. Distribution may be reported in the ROA narrative.
- Collaborative educational materials may be reported by each co-author.

**What is an Educational Contact?** An interaction with the intention to convey educational information to an Extension client.

- Research-based, educational information must be provided to the client.
  - A social media/web post or email about an upcoming event is not an educational contact.
  - A newspaper ad or newsletter without any educational content is not an educational contact.
- Social media, web posts, and messages that can be tracked and counted are considered educational contacts if the information contained is educational.
- Handing out a brochure or other material at a fair or public event is not a contact because we do not know if the recipient will read the material. This can be included as an educational activity in your ROA.

- Radio and TV interviews and printed newsletters are not counted as educational contacts, but rather as educational materials. The distribution is considered mass communication (the potential audience may be known but not the actual number who were reached), which may be reported in your ROA but not Workload
  - If someone contacts you to ask a question in response to a mass communication, that contact is counted as a consultation (e.g., phone, email/text message, social media contact).
- Electronic newsletters may be counted as an educational contact if there is a means to track whether the recipient opened and/or read the newsletter (e.g., open rate, click-through). Otherwise, follow the same guidelines as printed newsletter described previously.
- Educational contacts made by program assistants, support personnel, and/or volunteers should be counted by the faculty responsible for that program.
- A series of emails, texts, phone calls, social media posts/comments on a single topic counts as one clientele contact. For example, even if it takes 12 emails or phone calls for education on the topic of the original question, it is still one contact.

**Field and Office Consultations:** The number of individual consultations.

- Consultations are generally with one or a few related participants and informal. For example, multiple people in a household or workers from a single farm or youth center.
  - Even if there are several people in a consultation, it only gets counted once.
  - Education must be part of the consultation. Consultations solely for the purpose of relationship building do not count.
- Diagnostic services count as an office or field consultation if providing educational information in addition to the factual data on what was diagnosed.
  - For example, a soil sample report is not an educational contact but sending the results with an explanation of the results and recommendations is an educational contact.
  - The location where the diagnosis is done determines which location it is (field or office), even if the response is relayed by email, phone, text message, or social media message.
- At events, count the number of people with whom you directly speak and educate on a specific topic as field consultations. Do not count the full number of attendees at the event.
- Meetings with staff from other organizations are considered educational contacts if you are sharing educational and/or research-based information. Whether it is a field or office visit depends on where the meeting takes place.

**Group Learning Participants:** The number of Extension clientele present in a group setting.

- Involves multiple participants and is typically more formal and organized than consultations (and often include an agenda, speakers, educational materials, etc.).
- Examples include:
 

<ul style="list-style-type: none"> <li>○ Advisory Council Meetings (if providing education)</li> <li>○ 4-H in the Classroom</li> <li>○ 4-H Clubs and Special Interest Groups</li> <li>○ Day Camps/Residential Camps</li> <li>○ Clinics</li> <li>○ Demonstration/Field Trials</li> <li>○ Field Days</li> <li>○ County and District Events</li> </ul>	<ul style="list-style-type: none"> <li>○ State and National Events</li> <li>○ Group Teaching Educational Programs</li> <li>○ Group Meetings with individuals from multiple farms, households, or organizations (e.g., HOA)</li> <li>○ Social Media Events</li> <li>○ Distance or Online Learning</li> <li>○ Video Conferences or Webinars</li> </ul>
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- If multiple agents teach during one group learning event, each agent counts the number that attended their segment. If a segment is jointly taught, each agent counts the number of participants.
- If multiple volunteers or program assistants teach during one group learning event, the agent they represent only counts the attendees once.
- If one agent teaches multiple topics during one group learning event, the agent counts the attendees only once.
- If one agent teaches the same attendees in a series of group learning events, the attendees get counted for each event.
- ISTs and other presentations to academic colleagues or UF students do not get counted in Workload but should be reported as an educational contact in the ROA.
- If youth are the intended audience, but parents also attend, the parents can be included in the contacts if they are active participants. Do not count parents/guardians if they are only present to chaperone their own child.
- Online learning events (e.g., Zoom, Microsoft Teams) and social media events (e.g., Facebook Live) can be counted as a group contacts if they have some form of registration or other record of participation. Ideally, all registration methods should capture demographic data (e.g., gender, race, ethnicity) required for civil rights audits. If demographics are not captured or an individual chooses not to respond, you may count them as *unknown* for gender, race and ethnicity.
  - An important component of any educational program is evaluation. Use these [guidelines](#) for evaluating your Zoom events (and for setting up registration with demographics).
- Examples of other ways to collect demographic information from participants include:
  - Create a survey with demographic (and evaluation) questions and display the link at the end of your presentation. You may end up with a hybrid attendance, with some counted as participants and some counted as social media contacts.
  - You might know the participants from prior events and have collected those data in the past.
  - Ask participants to provide their email address via a private chat so you can collect that information later, or even ask them during the session to provide gender, race, and ethnicity in the private chat.
  - Do not ask viewers to submit demographics through the publicly viewed chat. Note: 4-H faculty need to follow youth protection laws in how they collect data.

**Telephone and Email/Text Consultations:**

- Only count phone calls, emails, and texts where you convey research-based educational content.
- Even if it takes several calls, texts, or emails to answer the client’s question, it only gets counted once.
- Faculty should report any phone calls, texts, and emails made by program assistants, support personnel, and/or volunteers in support of their program.

**Social Media Contacts:**

- Given the rapid evolution of social media platforms, check the [Workload FAQs](#) for the latest information about what metrics to use.
- Events that do not have a way to capture who the participants are through some type of registration or other record of participation, should count participants as Social Media Contacts rather than as a Group Learning Participants.

**Sources:**

- Craig, D. & G. Israel. [Reporting Clientele Contacts in Workload](#). EDIS #AEC377.
- PDEC. [Workload FAQ](#).
- PDEC. [Counting Clientele Contacts: Examples](#).
- PDEC. [Setting Up Registration and Evaluation Questions Using Zoom Meeting Template](#)