

Reporting Clientele Contacts in WORKLOAD¹

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The purpose of this fact sheet is to describe how the [WORKLOAD](#) application should be used to report Extension contacts. Extension contacts include clientele contacts and educational materials prepared. Compliance and accuracy in reporting these contacts in WORKLOAD is very important because the information is used to obtain our annual federal funding as well as gain additional state funds for the research, teaching and extension missions.

These data serve as productivity measures by the state of Florida for UF/IFAS Extension. The productivity measures, referred to as Research Delivery Units (RDU), consist of several elements contained in WORKLOAD—number of educational materials developed (including journal articles and other publications), contact with clientele via phone, email, or in-person visits, maintenance of Extension Web sites geared toward the general public, and group presentations to a non-credit and non-UF employee audience. In addition, EDIS publications are included in the RDU formula but those counts are collected elsewhere and should not be reported by faculty in the WORKLOAD application.

While contact with the community is most common among Extension faculty it also occasionally occurs 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

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:

- Individual consultations in the field or the office
- Face-to-face interactions in group meetings, workshops, field days, classrooms, and clinics
- Individual correspondence by letter, email or telephone
- Interactive video conference

The creation of educational materials and publications for a non-credit/non-UF employee audience is also considered a type of contact. In WORKLOAD (and in county Affirmative Action reports), faculty should report each original work one time. In the past, UF/IFAS counted newsletters, tabloids, and other direct mail that is sent to individuals who are either included on a mailing list or e-mail list as a clientele contact (Taylor and Israel, 1994). While these data are no longer requested in our accountability

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1. This document is AEC377, 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. First published May 2006 as *Extension Contacts: Definitions and Examples for Unifas*. Revised for November 2009 publication as *Reporting Clientele Contact in Workload*. Please visit the EDIS Web site at <http://edis.ifas.ufl.edu>.
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reporting system, they are important to track and include in the Report of Accomplishments (ROA) and Affirmative Action reports submitted each year to your District Director or unit leader. Likewise, if you participate in other mass media (i.e., radio, television, newspaper column, etc.) it is important to include these numbers in several other reports even though they are not captured in the WORKLOAD application.

Web visits are counted as an Extension contact in WORKLOAD. In federal reports these are treated as indirect contacts. In the RDU formula, the maintenance of the Web sites is estimated based on the number of Web visits reported, excluding duplicated counts. If you maintain Web sites for other faculty you should count the Web visits for those sites. The creation of a new Web site or Web page, or the significant revision of one, would be counted as an educational material. ([Figure 1](#))

Figure 1. Screenshot of the WORKLOAD Reporting Categories section in WORKLOAD.

Educational Materials	
Total number of educational materials prepared this year (excluding EDIS publications):	<input type="text" value="65"/>
Clientele Contacts	
Total number of field consultations for all programs this year:	<input type="text" value="5"/>
Total number of office consultations for all programs this year:	<input type="text" value="3"/>
Total number of telephone consultations for all programs this year:	<input type="text" value="26"/>
Total number of group learning participants (excluding in-service training) for all programs this year:	<input type="text" value="456"/>
Total number of email consultations for all programs this year:	<input type="text" value="53"/>
Total number of Web site visits for all programs this year:	<input type="text" value="2300"/>

Regardless of whether you have an Extension appointment, if you produced any written or visual materials for a non-academic audience or had any contact with community members to convey educational information about your research, teaching, or extension program, you should enter the data in the WORKLOAD Reporting Categories section shown above.

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 that 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 it is not required for the reports submitted by UF/IFAS Extension.

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/WORKLOAD/Clientele_Contacts_Log.xls.

Group Attendance

Group attendance is a specific type of clientele contact and refers to the number of Extension clientele present in group settings. Group Learning Participants is one of the five productivity measures used for UF during the state budget process. The following activities are to be included as group learning contacts 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

In-Service Training 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 together 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.

Clientele Contacts Made by Others

A faculty member is responsible for reporting clientele contacts for program assistants, support personnel, and volunteers that he/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, group attendance, and educational materials, in WORKLOAD under your own name.

Goal and Focus Areas

Federal reporting requires UF/IFAS to report clientele contacts by its statewide goals. To do this, faculty *who have an Extension appointment* are required, via WORKLOAD, to report their extension effort in one or more of the focus areas, which are grouped into seven statewide goals. The Goal and Focus Areas represent the current Extension Strategic Plan and the organizational structure for all Extension activities.

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.). This gives an approximate number of clientele contacts and publications per Focus Area.

Internal Contacts

Much of the work of Extension faculty, particularly CEDs and state specialists, is geared toward the education of other faculty members. A statewide goal area—Professional Development (Goal 7)—was specifically created to capture this internal effort. For the purposes of the USDA report and the RDU state formula funding, these are not to be counted as clientele contacts. Since we use a multiplier to estimate clientele contacts per focus area (i.e., 100 total phone calls x 30% effort in Water Resources = 30 phone calls for Water Resources), we exclude the Goal 7 effort from the distribution used for federal and state reporting. Therefore, be sure to accurately reflect the focus areas in which you work.

Providing educational information to stakeholders, advisory committee members, county administrators, government staff, and public officials should be reported under the appropriate focus team, not Goal 7. For example, leadership skills and team building training should be reported under Goal 5-Citizen Engagement, Leadership, and Community Development. Updating these groups about the status of the Extension office, or to obtain help with budget or other issues does not qualify as a clientele contact and should not be reported in WORKLOAD.

If you spend a lot of time in Goal 7 functions but have a lot of legitimate clientele contacts, you should weight your focus area effort outside of Goal 7 heavier to allow for the proper distribution of the clientele contacts. Please call PDEC to discuss further if you are unsure of how to enter clientele contacts relative to Goal 7.

How to Count WORKLOAD Contacts in Certain Situations

Below are some examples of how and when to count clientele contacts. These are general guidelines; use your best judgment in your own situation.

Situation	Number/Type of Contact	Notes
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 phone consultations	Only the faculty member enters the contact data in WORKLOAD.
An automated phone system counts the number of incoming and outgoing phone calls.	0	Transfer of information is unknown.
A secretary gives an educational pamphlet to a client who visits the Extension office and subsequently a faculty horticulturalist describes recommendations.	1 office consultation	Handing out a pamphlet does not count as a contact since we do not know if the person read the pamphlet.
Two agents teach to a group of 90 participants of a pesticide safety workshop for 1 hour each.	90 group learning participants	Each agent should report contacts in the portion of the class that they themselves taught. If all 90 stayed for both parts then each should count 90 contacts.
A County Extension Director meets with the new county manager to explain Extension and what it can and does provide for the county.	0	The primary purpose is marketing/public relations. It does not have an educational focus and therefore, not a clientele contact.

Situation	Number/Type of Contact	Notes
A state specialist creates a Web site for faculty in other states who do similar work.	0	The Web site is geared toward other faculty, not the general public, so it is not counted as a clientele contact. You would report this in your ROA.
An adult community member wants to become a volunteer and submits to a background screening process. At the Extension office, the 4-H agent discusses with the volunteer the qualities of a good youth volunteer and proper youth development practices.	1 office consultation	Part of the volunteer recruitment and screening process is education so this is counted as a consultation.
A faculty member sends educational information by email and then stores the email in a separate email folder.	1 email consultation	Faculty should store emails for audit purposes.
During a visit with one producer, the agent receives an invitation for lunch at the local diner. The agent meets with 10 more producers at a local farm and they receive educational information.	2 field visits	The first situation is one-on-one at the client's location. The second is not a formal class so it is still considered a field visit.
A secretary maintains a log of each person who walks into the Extension office.	0	Transfer of information is unknown.
An agent had a five minute educational broadcast every weekday morning at 7 a.m., which reached 30,000 listeners as shown through the ratings.	260 educational materials	The <i>original</i> broadcast is counted only (5 each weekday for 52 weeks). Note: if this is a summary or recitation of a written work or another broadcast, it does not count as original work. Indicate the audience ratings in your ROA.
An agent teaches in an out-of-state training program for a group of 20 farmers from Florida, Alabama, and Georgia.	20 group-learning participants	Out-of-state events are counted as a clientele contact.
A County Extension Director meets with a county health department staff member at their office and tells them of the newest research on diabetes. She offers ideas on how the staff member how they can incorporate that information into the diabetes information they deliver to clients. After the meeting she visits with three county animal control staff in an adjacent office and discusses with them recent research in this area and gives background information on the Extension staff who deal with animal-related issues.	2 field consultations	Each is counted as a field visit, regardless of whether it is one-on-one or multiple participants. Group events are more structured or formal and typically have an evaluation component. In WORKLOAD Program section, CED should identify the focus area to which these staff members relate rather than counting the effort under the Goal 7–Administration and Leadership.
4-H co-sponsors "Ag in the Classroom" which has 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).	500 group learning participants	Each faculty should count the group attendance of their own session(s), including any taught by a program assistant or volunteer.

Situation	Number/Type of Contact	Notes
An agent visits 25 buyers at a livestock auction in order to build relationships.	0	The purpose of the visit was not to transfer educational information.
An agent writes a monthly blog about gardening in South Florida that highlights the latest research at UF and how to put that research into practice at home.	12 educational materials	This is the equivalent of a monthly column in a newspaper or newsletter.
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.	205 group participants	Additional reporting is required for 4-H related activities. 4-H club attendance should be well-documented and estimates avoided.
A County Extension Director trains his staff on a new computer technology.	0	Training of staff or other UF faculty is not a clientele contact. This information should be included in the CED's ROA.
An agent writes a gardening article and sends it to an email distribution list of 5,000 residents that he maintains. He receives ten phone calls from recipients of the email who want additional information.	1 educational material, 10 phone calls	Any significant and original written work should be counted as an educational material regardless of distribution. The direct contact from interested citizens should be counted but not the mass mailing itself.
A farmer sends in a soil sample to be tested.	1 office consultation	Any diagnostic service performed in a laboratory should be counted as an office consultation. This assumes the service includes providing the client with educational information so they may put the factual data in context and know how to proceed. Simply giving a client a printout with test results is not considered an educational clientele contact.
Three Master Gardeners taught a workshop on making rain barrels to 50 people on three different occasions. (3 volunteers x 50 participants x 3 events).	450 group participants	The faculty member that oversees the MG program should enter these contacts under his or her own name.
An agent determines that 400 of the 500 newsletters placed at an Extension fair booth were distributed.	1 educational material	Count the original work only.
An FCS agent teaches a series of 3 separate workshops on family budgeting, preparing wills, and purchasing life insurance to 30 county employees. (3 events x 30 participants).	90 group learning participants	Even though the participants are the same they attended three separate events so each is counted as a separate contact.
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.
County director convenes a 20-member advisory board to discuss issues affecting the Extension office, and then spends a designated hour to train them on the latest techniques in pesticide management.	20 group participants	The general information provided to the advisory board is not considered an educational event and should not be counted. The hour set aside for training on pesticide management techniques is countable and should be entered under the appropriate program area, not Goal 7.

Situation	Number/Type of Contact	Notes
A 4-H event is held to teach 25 youth about marine biology. Two parents stay and listen in the back of the room.	27 group learning participants	Agents should use good judgment when deciding whether to count participants who are not a member of the intended audience. A parent who is an active listener is to be counted but a parent who is reading a magazine to pass the time is not.
An agent identifies a crop disease while at a local farm.	1 field consultation	Any diagnostic service conducted on site should be counted as field visit.
A County Extension Director gives an overview of his or her office to new volunteers.	0	This is a management/operations task and not the transfer of educational information about a specific Extension service.
A LAKEWATCH volunteer schedules a meeting with 10 citizens at a lake located in their neighborhood to discuss the water quality and what they can do to improve it.	10 group learning participants	Faculty member who oversees the LAKEWATCH program reports the contacts. It is counted as a group rather than field visit due to being a formally scheduled event with a large number of attendees.
A club leader files an application for a club charter that needs to be reorganized. The agent contacts the leader by phone and explains the quality indicators of a community club, the importance of working with diverse youth, etc.	1 phone consultation	The faculty member is conveying educational information to the club leader.
An EFNEP program assistant discusses a problem with a client using email. A total of 12 emails are sent between the two parties to solve the problem at hand.	1 email consultation	A series of emails or phone calls to answer a specific question or resolve a problem should be counted as one contact.
Six faculty work on a newsletter with each contributing a 6-inch column with original material.	1 educational material	Each faculty member counts the newsletter once. On a collaborative work, the contribution to the end product must be significant relative to the other authors.

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.

References and Further Information

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