

## Guidelines for Reporting Direct Educational Contacts

All extension professionals (agents, specialists, administrators, etc.) are required to report their direct educational contacts in the Program Evaluation and Reporting System (PEARS). This information is very important as it is used to obtain our annual federal funding as well as to showcase our efforts to our local, area, state and federal stakeholders.

**Direct educational contacts** are when both the extension professional and the client/receiver are linked together at the same time and/or place for educational purposes. Examples include:

- Individual consultations in the field or office
- Face-to-face interactions in workshops, field days, staffed displays, classrooms, clinics, etc.
- Individual correspondence by letter, email or phone
- Interactive conference calls and webinars
- An email, text, or social media message with educational interaction between the educator and learner(s).
- Educational contacts made by volunteers (see next page)

**Indirect educational contacts** are not required to be reported in PEARS at this time. An indirect contact is any time you don't know exactly who is viewing or reading your information. For example, you can send newsletters to 1000 people, but you can't be sure it is being read by everyone. Newsletters, radio, TV, and most social media are considered an indirect contact.

If an extension professional would like to keep track of indirect contacts for board reports and other reporting purposes, the "Indirect Activities" module in PEARS can be used.

### PEARS Modules for Reporting Contacts

Currently, there are two options for recording direct educational contacts in PEARS:

**Quarterly Effort Report:** This report records the percentage of your time spent on the KSRE Grand Challenges and the race, ethnicity and gender of your direct educational contacts for each quarter of the current program year, i.e. Oct - Dec, Jan - Mar, Apr- June and July - Sept. A spreadsheet or calendar is helpful in keeping track of direct educational contacts throughout the quarter. A sample spreadsheet is available at [https://www.ksre.k-state.edu/employee\\_resources/programming/program\\_development/](https://www.ksre.k-state.edu/employee_resources/programming/program_development/). Race, ethnicity and gender can be gathered from surveys and partnering organizations that are required to collect that information, i.e. schools, federal agencies. In the absence of that information, the current guidance is to estimate based on visual observation.

This module also provides an opportunity for extension professionals to record the number of direct educational contacts made by extension volunteers as well as the number of volunteer hours invested in extension programming. If reporting on contacts made by volunteers, extension professionals may report those numbers on an annual or quarterly basis.

**Program Activities:** This report allows users to track information about direct educational meetings and workshops and can be especially helpful in tracking specific programs that are delivered multiple times to multiple audiences or in tracking programs that have multiple sessions. In addition to reporting the demographics of participants, extension professionals can attach fliers, handouts and an evaluation survey.

For the 2019-2020 program year, we recommended that the Program Activities module be used for reporting on signature programs.

Once your contacts are reported in Program Activities, they need to be auto-calculated into the Quarterly Effort Report by clicking on the “Auto Calculate from Program Activity Demographics” button. Once those numbers are entered into the Quarterly Effort Report, you can adjust the numbers to include additional contacts not reported under Program Activities.

For the 2020-2021 program year, the goal is to transition to the use of the Program Activities module for most/all programs in order to better highlight our programming efforts.

### **Guidelines for Reporting Direct Educational Contacts**

- Total contacts by gender must equal the total contacts by race.
- Do not count mass media, newsletters (even to a target audience), news columns or radio and television spots. There is no way of knowing who actually read your article or watched/listened to that segment. You can count any follow-ups that occur as a result of those efforts.
- More than one contact with the same individual during a single day can occur if the individual participates in different program areas.
- Contacts related to Extension business (non-educational in nature) between Extension staff members or between extension staff members and volunteers are considered to be internal contacts and should not be reported. Examples include board and PDC meetings, staff meetings, Master Gardener Advisory Committees, 4-H Council meeting, etc.
- Face-to-face educational programming contacts between Extension staff members and volunteers should be reported when they are educational in nature, i.e. Master Food Volunteer Training, 4-H Project Leader Training.
- Program assistants make many contacts with clientele. Program assistants should keep records of those contacts and submit them to the supervising Extension Agent to enter into PEARS.

Contacts by Volunteers: Direct educational contacts made by volunteers (i.e., 4-H, Master Gardeners, Master Food Volunteers) and the volunteer hours are recorded in the Quarterly Effort Report and Program Activities modules. Both reports have a separate line to record volunteer contacts. Note: For the Project Activities report, enter the program as a program activity and add a note in the comments section that volunteers taught the class.

#### **Special Note:**

The total number of direct educational contacts is utilized in a variety of ways – NIFA Annual Report, Governor’s Children Budget, Legislative Reports and inquiries, and other marketing efforts and each has different specifications. In order to ensure that we are counting direct educational contacts appropriately, we have developed the following guidelines.

**Youth Contacts:** All youth development contacts in all program areas should be reported in PEARS for use in compiling the ES-237 federal report submitted to National 4-H Headquarters. Previously, this group enrollment information was submitted within 4-H Online. We are currently working towards combining both reporting systems to eliminate the duplication in reporting. We are piloting reporting this year and anticipate slight revisions for Fall 2020.

**EFNEP:** Direct educational contacts are to be reported in WebNEERS only and not reported in PEARS. We have access to the total number of contacts contained in WebNEERS and will add it to our total number of contacts from PEARS for legislative reports and marketing materials.

**SNAP-Ed:** Direct educational contacts are to be reported on the SNAP-Ed side of PEARS only. Do not include these numbers in your quarterly effort reports. We have access to the total number of contacts contained in this report and will add it to our total number of contacts for legislative and marketing materials. Any programming outside of SNAP-Ed should be reported in the Extensions side of PEARS.

## Frequently Asked Questions

**Q. How should we count program participants in a workshop series?**

A. Extension professionals who teach a workshop series can count the participants every time they attend one or more sessions.

**Q. What if two extension professionals are making presentations at the same event? Who counts the numbers?**

A. Only the lead agent should report the direct educational contacts.

**Q. As a state specialist, I am often invited by a local unit agent to present a portion of the program. Should I count those contacts or should the agent that invited me to make a presentation count the contacts?**

A. The Local Unit Agent should only report those contacts. If the local unit agent isn't involved or providing assistance, the specialist should report those contacts.

**Q. I am a state specialist and often provide training to extension agents. Do I report that in PEARS?**

A. While providing professional development/training for Extension staff is of great value to our organization, this would be considered an internal audience and not counted as a direct educational contact.

**Q. As the Local Unit Director, I am responsible for working with the county/district board. How do I report those contacts?**

A. Volunteers on the county/district board are focused on Extension business and would not be counted as contacts.

**Q. So how do I report contacts for fairs or similar large community activities?**

A. Direct educational contacts would include judges who attend an orientation session taught by staff or discussions with individuals who have questions about 4-H. Youth engaged in conference judging can be reported as volunteer contacts. Please do not report total attendance at the fair nor the number of individuals who just walk through the exhibits.

**Q. My job is 100% administrative so do I need to complete a Quarterly Effort Report?**

A. Yes, even though you may not have any contacts to report, we need to have you report the percentage of your time toward the Grand Challenges.

**Q. 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 report the contacts?**

A. If there is no practical means to collect the 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 make-up of its student body that they should be willing to share with you.

**Q. How should I report soil tests, radon test kits, etc.?**

A. If you provide the recipient with educational information about their test results, you can count each of those instances as a contact.

**Q. Should we count the number of phone calls from clientele asking about the time and place of events?**

A. Contacts that are of an extension "business" nature should not be counted. If a client is asking for the date and time of an extension program, information on how to sign up their child for 4-H camp or to find out the telephone number of another organization in your community, the contact is considered of a business nature and should not be counted.