How to Report Extension Contacts

Why Do We Report?

Virginia Cooperative Extension (VCE) recognizes the importance of accessibility and reaching all audiences in the development and implementation of Extension programs. Beyond our own interests in program inclusion, as a federally funded agency, VCE is required to comply with USDA Civil Rights policies, rules, and regulations. Specifically, VCE must establish and maintain a system for collecting and reporting data on clientele participation in Extension programs. This data system must obtain demographic 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 Virginians with our educational programs. VCE uses the Program Evaluation and Reporting System (PEARS) (http://www.pears.io/) for gathering contacts data on an ongoing basis to meet federal and state expectations. Unique participants are used to help understand who participates in VCE programs, and duplicated contacts are used to demonstrate the total VCE program reach.

VCE collects both direct and indirect educational contacts. Both types of contacts are reported by Program Area and by date. This enables us to summarize data by program and by calendar and fiscal year.

Most importantly, you can use your own contacts data to talk about your reach within the community with local councils, boards, and other community groups.

What Are Direct and Indirect Contacts?

A **Direct Contact** refers to one-on-one 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 Virginia Cooperative Extension is carried out. Programs delivered through videoconferencing (Zoom, Microsoft Teams, etc.) that include two-way interaction between the presenter(s) and audience, like a live webinar, may be reported as direct contacts. Direct contacts can include text messages, emails, or social media messages where individualized education or a direct response to a question was provided.

An **Indirect Contact** is made through one-way communication to an audience. Indirect education is the distribution of information and resources, including any mass communications, community events, interviews, advertisements, and materials distributions that are not considered direct education or social marketing.

Who Collects and Reports Contacts?

All people employed with Virginia Cooperative Extension by Virginia Tech and Virginia State University and those who volunteer for VCE, who have contact with clientele for the purpose of educational delivery, are required to **collect** clientele contact data. Table 1 lists groups of staff members who must **collect** contacts and how those groups are to **report** their contacts.

Table 1. Contact Reporting

Staff Who Must Collect Contact Data	How Staff Members Report Contact Data
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
Extension Staff (Program Associates, Assistants, and Technicians; Project Associates	Must report data through Extension agent
Administrative Assistants at all Levels	Must provide contact data to supervisor
SNAP-Ed and EFNEP Program Assistants	Will provide contact data to their District Program Coordinator
Salaried county/city employees supervised by Virginia Cooperative Extension	Will submit contact data to supervisor
Volunteers in all program areas	Must provide contact data to Extension point of contact

What Information Is Reported?

Direct Contacts

Direct contacts through a planned program will be reported as part of a Program Activity entry in PEARS; other direct contacts are reported for other one-on one Direct Contacts. Reports will ask for the following information.

1. Contact Method

Several contact methods are listed in PEARS:

• Email

• In Person

• Phone

• Social Media

• Text

• Video Conference

• Other

2. Demographics

Demographics of gender, age, race, and ethnicity are reported for Direct Contacts. When reporting demographics in PEARS, each person is counted one time for their participation at any time in each program. (PEARS collects the number of participants for each session of a program activity. in the general information section.) Demographic categories are defined as follows:

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.

Age
• By age bracket, or simply total youth and adults.

Federal guidelines for the collection of demographic data only allow for program participant self-reporting. The VCE Program Participant Self-Reporting Form, Publication 490-850, can be used to collect this data. Youth (<18) gender, ethnicity, and race data may only be reported by a parent or legal guardian. For each demographic category, "prefer not to respond" or "unknown" can be indicated when appropriate.

3. Data Source

When direct contacts are made as part of a specific program activity, the contact record in PEARS can indicate:

• Method used to determine demographic makeup of participants: whether demographics are an actual or estimated count.

• Source of data: commercial market data on audience size, survey of target audience, site-provided demographics (e.g. from school class enrollment record), and other means.

Indirect Contacts

Reporting expectations differ for contacts made through indirect activities. Demographic information is not expected, just a total reach.

1. Intervention Channel

The following communication channels for indirect activities are listed in PEARS:

• Articles

- Billboards, bus/van wraps, or other signage

- Blog

- Calendars

- Community events/fairs - in which participated

- Community events/fairs - only sponsored

- Electronic materials (e.g. email and electronic newsletters or mailings/text messaging)

- Fact sheet

- Hardcopy materials (e.g. calendars, fact sheets, flyers, pamphlets, recipe cards, newsletter for mailings)

- Nutrition education reinforcement items (e.g. pens, pencils, wallet reference cards, magnets, door hangers, and cups with nutrition messages)

- Paid radio advertisement

- Paid TV advertisement

- Podcast

- Point-of-sale or distribution signage (e.g. displays or window clings in retail stores)

- Radio interview

- Radio public service announcement

- Site-level assets (e.g. posters, banners, a-frames, displays)

- Social media (e.g. Facebook, Twitter, and Pinterest)

- Software application

- Television interview

- Text messaging (sending health promotion through text/SMS)

- TV public service announcements

- Videos (includes CD, DVD, USB, etc.)

- Videos (includes YouTube)

- Websites

- Other, please specify

2. Location

Indicating a site is optional; leave this blank if the indirect activity was virtual. If the location of the activity is not found in the list, contact cgalardi@vt.edu to have a site added to the list.

3. Reach and Data Source

The report should include the estimated number of unique individuals reached. The data source can be commercial market data on audience size, a survey of target audience, site-provided demographics, visual estimate, and other means.

When Do I Report Contacts?

Data entries for Direct Contacts are tagged with a unit and month, and Indirect Contacts can be reported for specific dates or time spans. Records for Program Activities and Direct and Indirect Contacts should be maintained on an ongoing basis, at least quarterly. Recording data more often results in less confusion and reduces the chance of losing data. PEARS allows users to enter data as often as needed and edit if information changes throughout the calendar year. It is encouraged to report frequently so that leadership can use current, accurate data to respond to requests throughout the year.

Where Do I Report Contacts?

From calendar year 2025 forward, VCE uses PEARS to report Direct Contacts and Indirect Activities. For employees to report contacts, they must have an active Virginia Tech PID (a computer user ID and password).

First, log into PEARS using Virginia Tech Single Sign On (SSO) credentials. On the top menu bar, the Engage tab lists three modules that are used to report contacts, as shown in Figure 1.

1. Contacts made as part of a direct education meeting or intervention should be reported as a Program Activity and do not need to be reported separately in the Direct Contacts module. This link includes step-by-step instructions to create a program activity (https://support.pears.io/create-a-program-activity/).

2. Other Direct Contacts not made as part of a specific program activity should be reported using the Direct Contacts module. This link includes step-by-step instructions to [add a new direct contacts record](https://support.pears.io/add-a-new-direct-contacts-record/) (https://support.pears.io/add-a-new-direct-contacts-record/).

3. Indirect Contacts are reported through Indirect Activities module. This link includes step-by-step instructions to [create an indirect activity](https://support.pears.io/create-an-indirect-activity/) (https://support.pears.io/create-an-indirect-activity/).
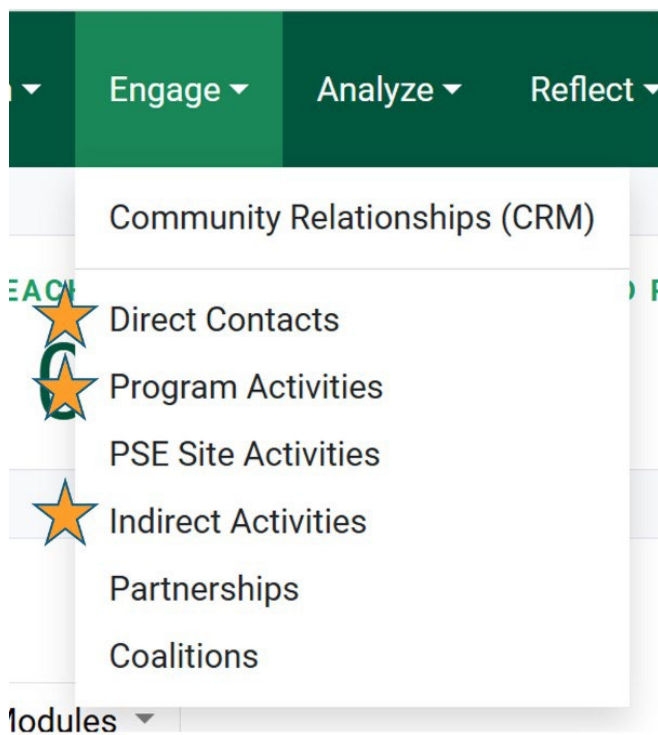

Figure 1. PEARS modules for reporting contacts, indicated by stars.

More than one activity can sometimes be combined into a single record. For example:

• You may list multiple sessions in a data entry for a program activity if delivered to the same audience.

• You can combine all direct contacts into one monthly summary record if all pertain to the same Program Area.

• You can list multiple intervention channels and the associated reach for each one into one indirect activities report.

FAQs

What if multiple faculty members are involved in a program activity?

PEARS allows a faculty member to tag other VCE faculty members that participate in program activities or indirect activities as collaborators. PEARS will allow those contacts to be attributed to each team member. However, for direct contacts not connected with a program activity, like one-on-one consultations, each faculty member should report their own contacts.

How can I distinguish between education 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. VCE is only interested in collecting educational contacts. An educational contact with a client should reflect the VCE Mission: **Virginia Cooperative Extension helps lead the engagement mission of Virginia Tech and Virginia State University, the commonwealth's land-grant universities. Building local relationships and collaborative partnerships, we help people put scientific knowledge to work through learning experiences that improve economic, environmental, and social well-being.** 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.

Other common situations include:

• One-on-one educational programming contacts between Extension staff members and volunteers are reported in the Direct Contacts section.

• Contacts related to Extension business (non-education in nature) between Extension staff members and between Extension staff members and volunteers, i.e., internal contacts, should not be reported.

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• Contacts related to Extension educational programming between Extension staff members (Specialist to Agent, Agent to Agent, Agent to Program Assistant, etc.) such as in-service training, should not be reported.

How can support staff and volunteers collect demographic information for supervisors and agents to report?

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 in PEARS. If the contact was one-on-one, the data should be recorded and reported as a Direct Contact. If contact was made through indirect education, then the contact should be recorded and reported as an Indirect Activity. Record of Contact, VCE Publication 490-157 (https://www.pubs.ext.vt.edu/490/490-157/490-157.html), is available for support staff and volunteers to use in office environments for the purpose of collecting direct and indirect contact information.

All VCE 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.

How do I maintain accurate reports of 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 in PEARS, perhaps at the same time as you do other monthly functions like record leave time.

Direct contact is defined more broadly than before— not just face-to-face, but any one-on-one educational interaction with clientele. What are some examples of what is included and what is not under this definition?

Educational information may be provided in a one-on-one conversation, consultation, or a 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. One-on-one contact with an exchange of educational information can happen via text or social media message or phone call. However, if the one-on-one contact only pertains to the dates of the fall feeder-calf sales, the place of the "Quantity Cooks" workshop, or to sign up a child for 4-H camp, then the contact is not educational, but "business" in nature. Business-related Extension contacts should not be counted.

There are more options for indirect activities than we had available before. Can you give some specific examples of what is and what is not included as indirect contact?

The list of intervention channels in PEARS provides examples of many ways you can make contact through indirect education. This list can provide inspiration for new ways to reach your community, beyond more common methods like educational newsletters to a mailing list. If the contact is sharing educational information without directly engaging the recipients, then this would be considered an indirect contact. In some cases, direct and indirect activities may be related. One example is that a live virtual training with audience participation could be documented as a program activity, and if a recording of the training was posted to YouTube, then it is now an indirect activity.

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

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. You would use the roster for each classroom to record attendance at the 4th grade 4-H program. You can use attendance information to report participants by session; you can use program registration to report unique individuals in the demographics section of the PEARS program activity record.

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. You can indicate the data source when reporting this program activity in PEARS.

The way we count participants in programs for contacts reporting is different from the way it was in the past. How should we collect and count contacts now?

PEARS collects information about community participation in programs by only counting each person once for demographic data. In PEARS, you will report unique contacts by counting each individual who attended a program. If you offer a program for six sessions, and some individuals come every time but some come only once, each person is counted one time toward program demographics no matter how many times they come. PEARS also collects attendance for each session on the general information page. This way we can collect information about community representation in VCE programs, and we can also estimate total program reach. (new para) To collect unduplicated participant information, it is recommended to create a registration list and check off who attends each session, so you can have information on the demographics for all participants and the number of attendees in each session. You can also contact the VCE Data Integration Specialist to explore tools in PEARS for collecting demographics and managing program participant registration that can integrate with your reports.

Further questions? Please contact Christina Galardi, VCE Data Integration Specialist, at cgalardi@vt.edu.