**Tracking and Recording Educational Contacts**

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For more detail, reference Video and Powerpoint

**Part 1: What to Collect and Why**

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| Why?   * To communicate value, plan our programming, to expand access within our organizational efforts, and to protect Extension’s Mission in Wisconsin | What?   * Race, ethnicity, age, and sex * **We collect CONTACTS, not people or participants** * Never guess   Participants: Individual people  Contacts: The amount of times we interacted |

**Part 2: How to collect and store participant data**

The basics of data collection:

1. Obtain information on race/ethnicity/age/gender
2. **Again, we collect CONTACTS**
3. If you teach with one or more colleagues, only one person needs to report
4. Data must be tied to one county (case for participation records)

When should I collect demographic data?

* Collect upon registration or sign-in
* After the first session of a series
* Make sure you:
  + Collect evaluation data on separate forms
  + Hand out/send the form to ALL participants

How should I store data?

* Store the data on password protected devices and/or in safe, locked drawers
* Do not store on google à use UW Box
* Aggregate data as soon as possible and destroy/delete individual records
* In case of requests for sharing data, contact AED, Institute Director & Data Governance first

**Part 3: Entering, Editing, Viewing, and Exporting Data**

* Enter data each quarter
* Do not modify past records à add data to the next form
* Indicate the day of first event (Tip: collect contact data the first session, and then multiple by # of sessions)
* Lump events that fall into a broader programmatic effort that spans multiple quarters

**Q&A**

**Q: If I have a record for an event on a reservation, should it be entered for the reservation, the county or both?**

A: Tribal nation should be on ‘geography served’ drop down list as a county.

**Q: Is Qualtrics okay for collecting demographic info online?**

A: Yes, but do not use a private Qualtrics account. Use your official [UW Madison Qualtrics account](https://it.wisc.edu/services/surveys-qualtrics/).

**Q: Can we report the number of contacts we have within a program to our county oversight committees if they ask for adults/kids/how we’re reaching underserved audiences?**

A: Check with your AED first. Confidentiality doesn’t mean we can’t share data; it means we are intentionally sharing data.

**Q: I have adult leaders who want to collect their own demographic data. Is that okay?**

A: No, volunteers should not collect their own demographic data. You can share aggregated data, so they get an idea but aren’t collecting it themselves.

**Q: What software should be used if support staff are the ones to enter the data and they do not have access to UW Box or Qualtrics?**

A: They can enter data into Qualtrics using a public link.

**Q: In the portal, can you change and edit other data for an event? Can you track those changes?**

A: There are no tracking changes capabilities. In My Participation Records, you can sort grid by date modified.

**Q: How do you find your aggregate data from your participation records that you entered?**

A: You need to export those separately and then aggregate in a spreadsheet. \*\*see the help pages for the Planning & Reporting Portal for instruction videos

**Q: Who can I contact for help?**

A: [datagovernance@extension.wisc.edu](mailto:datagovernance@extension.wisc.edu)

**Helpful Links:**

FAQs, Definitions, Sample Forms

<https://wices.knack.com/recording#homes/>

General Information on Policy and Office Hours

<https://wices.knack.com/recording#general-help/>

Help email for the planning and reporting portal

[datagovernance@extension.wisc.edu](mailto:datagovernance@extension.wisc.edu)

If you have trouble with logging in, please contact the help desk: [help@doit.wisc.edu](mailto:help@doit.wisc.edu)