

Utilizing Report Information

Techniques for collecting and processing reports should be determined by the use to be made in the information/decision process

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Extension reports are sought as bases for providing information to appropriate publics and officials and, presumably, as the basis for making organizational and program decisions. Evidence from a study in one state indicates some limitations to the use being made of information currently required in the reporting system. A revision is suggested to maximize the usefulness and minimize the time required for preparing such reports.

PREPARING reports can be "a pain in the neck" as many Extension personnel view it. And it can be downright unbearable to do reports that will never be used. However, reporting can be less of a chore for Extension personnel if they can (1) render reports that contain important facts they know will be used in making decisions pertinent to Extension operations and (2) employ electronic computers in preparing, storing, and distributing information. The use of electronic computers to facilitate purposeful statistical reporting in the Cooperative Extension Service is highly promising. The value of electronic data processing (EDP),¹ according to authorities, lies in the sheer efficiency with which data can be stored and transmitted to decision centers.²

An examination of a reporting system has been made based on

¹See John R. Schmidt, "Relationship of EDP Record Analysis and Forward Planning," paper presented at the symposium on "Present Use and Potential of Linear Programming and Other Operations Research Techniques in Farm Management Extension," Columbia, Missouri, January 13, 1965, pp. 1-2 (mimeographed).

²John M. Piffner and Frank P. Sherwood, *Administrative Organization* (Englewood Cliffs, N.J.: Prentice-Hall, Inc., 1960), p. 455.

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two assumptions: (1) statistical reports can be useful to staff in making decisions pertaining to the Extension program; and (2) reports are necessary bases for documenting Extension activities in support of requests for resources, since Extension is supported by public funds.³

Statistical reports in the Cooperative Extension Service presumably tabulate accomplishments and activities. Hopefully, these reports serve as a means to accomplish Extension objectives and not as an end in themselves. The purpose of this article is to examine the Extension statistical reporting system with respect to needs, efficiency, and possibilities for future applications. Traditionally these reports treat "teaching techniques used to reach clientele" and frequently take the form of "score cards" showing one or more of the following: (1) how the Extension program was carried to the people; (2) how the information was exposed to clientele; (3) how clientele have been exposed to information.

As long as men make decisions that might be facilitated by information, reports will be sought.⁴ They serve as a link in the unending *information/decision* process.⁵ However, reports in the Cooperative Extension Service are plagued by problems. Some staff members—often those principally concerned with getting results—find report preparation a distraction. They claim to lack time to do the task and often report a dislike for reporting. The difficulty is not simplified by the large volume of detailed statistical reports required. For example, in Pennsylvania seven forms are used in the process of securing and summarizing data depicting each county's program and activities. However, the basic issue should be (1) what information is needed and (2) what statistics are vital to the *information/decision* processes in Extension operations. Techniques to efficiently collect and process needed information should be selected on the basis of how well they fill these needs.

A CASE STUDY

A study of statistical reporting was conducted in the Pennsylvania Service to gain insight and information relevant to these concerns. County staffs, specialists, and the administrative staff were

³ Marion R. Deppen, "Statistical Reporting in the Pennsylvania Cooperative Extension Service: Needs and Possibilities Utilizing Electronic Data Processing" (unpublished M.S. thesis, University of Wisconsin, 1965). This study was made possible by a fellowship grant provided by the W. K. Kellogg Foundation through the National Agricultural Extension Center for Advanced Study.

⁴ John Ball and C. Williams, *Report Writing* (New York: Ronald Co., 1955), p. v.

⁵ Paul F. Douglass, *Communication through Reports* (Englewood Cliffs, N.J.: Prentice-Hall, Inc., 1957), p. 3.

surveyed to determine (1) what data are vital to decision making in the operation of the Extension program and in reporting to the public and (2) what degree of importance Extension personnel ascribe to particular classes of statistical data currently sought by the reporting system. Respondents in the study were asked to indicate whether a report or report-category was used or not used for specific functions. They rated the usefulness of report categories as being "vital," "helpful," or "doubtful" in making decisions.⁶ Twenty-four report categories (e.g., days worked, farm visits, meetings, telephone calls, radio broadcasts, etc.) were evaluated as to their specific possible functions. These functions included: (1) program planning, (2) program evaluation, (3) preparing reports for the public (mass media, legislators), (4) substantiating budget requests, (5) preparing annual plans of work and annual reports, (6) identifying county staff training needs, and (7) identifying research needs.

County personnel reported moderately high use of statistical reports but seemed to feel that the reports were not "vital" for their purposes. Data depicting meetings, 4-H units and groups, and individual assistance were designated as most useful by county staffs. Data portraying meetings held with clientele (especially meetings to train local leaders) and leader-held meetings were noted as being employed in program planning and program evaluation to a greater extent than the other types of required data. Reports of farm visits, telephone calls, and office calls appear relatively valuable to county staffs when they report directly to the public and when they make budget requests. Such data, often referred to as indicators of personal service, were rated as being "vital" more often than those categories of data which reflect more impersonal type contacts with the public. In rating the value of required reports in respect to selected functions, county workers considered them most valuable for evaluating programs. They were also valued for supporting budget requests, reporting directly to the public, and planning programs.

According to their response, specialists used county statistical reports very little. They reported making greatest use of them in preparing plans of work and annual reports, but only a bare minimum amount of this use was considered "vital" to making decisions. Specialists said they use reports occasionally in program planning and program evaluation but rarely in identifying county staff training needs and in identifying research needs. Nearly half of

⁶A report category identified as "vital" was defined as being required as the basis for a sound decision—without such information a sound decision could not be made; a data category rated "helpful" would be of probable but undetermined value; the use of a category rated "doubtful" would be highly questionable.

the Extension specialists indicated they are handicapped by the form of existing report data from the counties. These specialists ask for greater specificity in data pertinent to their programs. The accuracy of county and statewide reports pertaining to specific subject-matter areas was questioned by specialists.

The administrative staff reported most of the 24 categories of data as being used and "helpful." However, they specified three "vital" categories: meetings, 4-H membership and projects, and individual assistance rendered. Many of the data were considered "helpful" in evaluating county programs. Compilation of county reports to obtain a statewide picture was judged "vital" as a basis for evaluating the entire program. Administrators emphasized as being "vital" the need for evidence to be included in special reports to federal and state legislators. The administrative staff indicated that reports are "vital" as the basis for responding to the requests legislators make for data depicting Extension activities in their district.

Recommended Revisions

More than half of those on the Pennsylvania staffs emphasized the need to simplify statistical reports and to revise and update classifications of Extension projects and activities. Sixty-one per cent on the staffs indicated that present reports fail to identify clientele groups to the extent necessary in making decisions pertinent to the Extension program.

There was no solid consensus and no clearly defined pattern among specialists, the administrative staff, and county staffs regarding what constitutes "vital" categories of data that should be reported as a basis for making decisions. Very low index scores illustrated the specialists' limited use of county statistical reports. The perception of the value to administrative and county staffs of several data categories is in a somewhat similar pattern, although not clearly defined. Most of the 24 data categories utilized in Pennsylvania are considered not crucial by Extension staffs in making decisions (the notable exceptions were meetings, 4-H units and groups, and individual assistance).

A shift in emphasis from "teaching techniques used to reach clientele" (statistical report headings in certain Pennsylvania reports and the Federal Extension Service statistical report form, FES-21) to reports that portray specific groups ("to whom") that receive specified subject matter ("what information") was suggested. "What information to whom" appears to have the potential for supplying quantitative report data that will be more meaningful to Extension

staffs in making decisions. A majority of Extension staffs recommend that the classification of Extension projects and activities be updated and revised. This suggests that the recording of "what information" (specific subject matter) is of merit in a statistical reporting system. Specific clientele groups ("to whom") that Extension serves or feels it should serve need to be identified. The respondents to this study listed 26 clientele groups. Statistical reports denoting who is served are consistent with Extension's paramount objective, "the development of people themselves."⁷

In order to structure the proposed statistical reporting needs into a workable system, two major dimensions are suggested: (1) subject-matter information presented and (2) clientele groups served. Teaching methods used are of lesser importance. The goal is to provide output reports of maximum value from input⁸ reports secured with minimum effort.

COMPUTERIZED REPORTING

A trial statistical reporting system has been developed for the Pennsylvania Extension Service. This instrument functions as a systematic method for securing, arranging, distributing, and storing input data and for analyzing and tabulating selected output data. Essentially this model provides the means for collecting, processing, tabulating, and printing selected statistical reporting data on as many as 205 subject-matter projects and activities for ten separate clientele groups from each of 67 counties. These inputs will provide the potential for many thousands of items of quantitative output data on a routine basis. Specific reports for special purposes will also be provided.

It is assumed that this model has several practical advantages over the statistical reporting system now being used, including (1) simplified input forms and reporting procedures for county staff members; (2) flexible output reports, relatively easily obtained; (3) efficiency of operation; and (4) accuracy in recording, tabulating, and reporting.

This electronic statistical reporting system would be constituted in the following manner:

1. From individual county staff members:

a. *Meetings* are to be reported on IBM cards. On the cards the

⁷Joint Committee Report on Extension Programs, Policies, and Goals (Washington, D.C.: U. S. Government Printing Office, August, 1948).

⁸Input data, in this sense, constitute a quantitative record of an Extension event, contact, or activity of a nature that contributes to the attainment of Extension objectives. Output data are input data translated into a useful form.

staff member is to write (1) the subject-matter code for the meeting, (2) the attendance, and (3) the clientele group present. (The codes identifying the county, the individual, and his staff position are prepunched.)

- b. *Individual assistance* is to be reported by noting a tally (by subject-matter area) on a form for this purpose.
- c. Prepunched IBM cards are to be supplied for reporting 4-H projects.

Monthly, county workers will mail to the data processing unit IBM cards reporting meetings and forms showing individual assistance. Four-H project reports will be made annually.

2. Processing at the computing center:

Card punching is to be completed on meeting report cards and 4-H project report cards, and data on individual assistance forms are to be punched on cards. After all punched cards are verified, the information is to be transferred to magnetic tape. A program developed by an electronic data processing technician utilizes the data on the magnetic tape to produce computer printed output reports.

3. Output reports:

Monthly county reports are to be compiled and mailed from the computing center to the county and the administrative staff. Special reports for specific purposes can be provided, as needed, by this system.

This model system has the possibility of being a useful tool to Extension staff members in supplying data needed for making decisions pertaining to the Extension program. Hopefully it will provide relevant data and yet require minimum staff involvement in the initial reporting process.

BECAUSE EXTENSION workers are employees of Land-Grant Colleges and Universities, they have an opportunity and an obligation to be competent in their subject-matter fields. The competence and objectivity that result from this tie with the University have earned for Extension workers the confidence of people throughout the United States. Because he lives among those he serves, the Extension worker is generally accepted as one who can be trusted implicitly, and many people feel there is a certain aura of high status associated with receiving their information from the Extension agent.

— MARGARET C. BROWNE.