

Getting Annual Report Data from the VMN-VMS

Here is a step-by-step process to guide you through getting most of the quantitative data needed for your chapter's annual report. Not all the annual report data can be gleaned from the VMN-VMS, but much of it can be.

1. **Make sure the data is complete and reviewed by volunteers.** Set a deadline for all chapter members to enter their hours into the system. Ask each member to review his/her hours before the deadline by going to "View Your Hours" under "Your Information". In particular, each member should check to make sure that the correct number of hours were reported, that the hours correctly as Continuing Education (Advanced Training) or Volunteer Hours, and that the hours were reported to the right projects.
2. **Double-check the chapter roster.** Under "Administration", click "Manage Roster". Make sure that *every* individual who has graduated from your Basic Training Course is listed in the roster, even if someone is no longer active in the chapter. This inclusion will allow us to get an accurate count of the number of people who have been trained as Virginia Master Naturalists, and it will allow you to track the retention rate of your chapter. *DO NOT* delete individuals from the system. Deleting individuals will make it difficult to get an accurate count of people who have participated in the program and it will make it very difficult to add people back into the system if they join a different chapter.
3. **Review volunteer and continuing education hours.** Do some spot checking of the volunteers' hours reports by going to "Hour Reports", entering start and end dates so that only 2011 data are included, and clicking "Expanded Report". Look for common errors. These errors could include reporting to the wrong project, reporting advanced training as volunteer hours or vice versa, accidentally adding digits to the hours to cause impossibly high numbers, etc. You will not be able to catch every mistake, but some spot checking can be helpful.
4. **Review and update each member's status.** This step will take some time! Update the status of each person to reflect his or her status for 2012 (Trainee, Virginia Master Naturalist member, Certified Virginia Master Naturalist, Honorary, inactive, Chapter Partner/Instructor). Individuals cannot edit their own statuses; only system administrators can edit this field. If someone's certification expires on 12/31/2011 and that person has not completed the requirements for recertification for 2012, change that person's status to "Virginia Master Naturalist member" if he or she is still a member of the chapter. If the person has moved away or specifically requested to leave the chapter, you should change the status to "inactive." Individuals with "inactive" status will not receive any emails from the system, so this status should be reserved for those individuals who truly will not be involved with the chapter again in the near future.

You can tell which individuals have completed the requirements for recertification for 2012 by going to "Hour Reports" and entering start and end dates so that only 2011 data are included. If you are uncertain as to when someone's current certification expires, please check the Excel spreadsheet of certification data included in your annual report package. The data in the Excel spreadsheets is based on your chapter's past requests for certificates and pins.

At this point, you can now easily fill out the "Membership" section of the annual report by going to "Manage Roster" and finding the total number of people in each status, listed at the bottom of the page.

5. **Review and update your project list.** Go to “Manage Projects” and enter start and end dates so that only 2011 data are included. Spot check the hours listed, looking for data that don’t make sense. If you want to check the individual hours for any given project, click on the project name and scroll down the page to the link that says “View Hours” under the Volunteers heading. This link will give you a list of hours completed on that project, broken down by date and by volunteer. As you review your project list, you may want to make sure that projects with the sponsoring agencies of VCE (including 4-H), VDOF, VDCR, VDGIF, and VMNH are clearly indicated because the annual report template asks you to list projects and hours with our sponsoring agencies.

6. **Determine number of advanced training and volunteer hours by project type.** Go to “Manage Projects” and enter start and end dates so that only 2011 data are included. Click “Create Excel”. Use the resulting spreadsheet to total up the number of hours for Continuing Education (Advanced Training), Education/Outreach, Citizen Science, and Stewardship. This process is much easier if you named your projects to include the project type (such as with a code of A, E, C, or S), so you might consider going back and updating the names if you are finding this step difficult.

7. **Obtain a report of Contacts.** Go to “Contact Reports” and enter start and end dates so that only 2011 data are included. Click “Create Excel”. The resulting spreadsheet should have all the contacts listed by race and ethnicity, gender, and youth/adult, exactly as is needed for the annual report.