

## **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 all members to review their 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 were correctly entered as Continuing Education or Volunteer Hours, and that the hours were attributed to the correct 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that *every* individual who has graduated from your Basic Training Course is listed in the roster, even if someone is no longer active in the chapter.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 more 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 2020 data are included, and clicking "Expanded Report". Look for common errors. These errors could include reporting to the wrong project, reporting continuing education 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 2021 (Trainee, Virginia Master Naturalist member, Certified Virginia Master Naturalist, inactive, Chapter Partner/Instructor/Friend). Individuals cannot edit their own statuses; only system administrators can edit this field. If someone's certification expires on 12/31/2020 and that person has not completed the requirements for recertification for 2021, change that person's status to "Virginia Master Naturalist member" if he or she is still a member of the chapter. If anyone has moved away or indicated they no longer intend to participate in the program, you should change their status to "inactive." You can tell which individuals have completed the requirements for recertification for 2021 by going to "Hour Reports" and entering start and end dates so that only 2020 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. Only those with "trainee", "Virginia Master Naturalist member", and "Certified Virginia Master Naturalist" status should be counted in your chapter membership.

5. **Review and update your project list.** Go to “Manage Projects” and enter start and end dates so that only 2020 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, VDWR, VMNH, VDEQ, and VIMS-CCRM are clearly indicated because the annual report template asks you to list projects and hours with our sponsoring agencies.
6. **Determine number of continuing education and volunteer hours by project type.** Go to “Hour Reports” and enter start and end dates so that only 2020 data are included. Then click “Expanded Report” at the top of the screen, and then click “Create Excel”. On the resulting spreadsheet, sort the data by the “Category” column (project type), and then sum the volunteer hours for each project type. For Continuing Education, you should instead sum the education hours (the last column.) Please note that if a member has transferred to another chapter part-way through the year, their hours from the whole year will no longer be listed for the prior chapter. They will be listed with the new chapter, even if they were completed with the prior chapter. If you go to “Manage Projects”, however, the hours of any volunteer who has transferred away are still included in those project totals. In addition, the “Hour Reports” will include hours on the few statewide projects that we have listed. These hours are not viewable to chapters on the “Manage Projects” page.
7. **Obtain a report of Contacts.** Go to “Contact Reports” and enter start and end dates so that only 2020 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.