

Part II—Verifying Data, Generating & Transferring the ES237 Files

Contents

Verifying Data for the ES-237 Report

- A. Individual Records for Members/Leaders
- B. Special Report for Isolating Missing or Invalid Club Links
- C. Using the Query to Isolate Missing Required Data on Individual Records
- D. Verification Report
- E. Check Unit (Club/Group) Count/Delivery Mode for Individual Clubs/Units
- F. Check Unit (Club/Group) Integration
- G. Check Group Youth Enrollments
- H. Check Volunteer Group Enrollments
- I. Check Training Log

Generating the ES-237 Report

What if my report doesn't balance?

Transfer Data & ES-237 Files to State

Optional Statistical Reports

Verifying Data for the ES-237 Report

All data, including individually enrolled Youth and Leader records, Group Youth, Group Volunteer, and Training Report records, should be entered BEFORE running the ES-237 Report. Records should span the 4-H year, October 1, 2008 through Sept. 30, 2009. (Group enrollments occurring in Sept. may be included in the following year, since year-end data must be collected in Sept.) Following are several steps you can take that will help the final report generation go smoothly.

FIRST: After doing all data entry for the year, run an ES237 Report in Blue Ribbon by going to ES237/ES237 Statistical Report. Run a combined, final report. Look for matching totals for duplicated and unduplicated youth and units on pgs. 1-3. Projects on Chart 12 should match Grand Total on pg. 10.

A. Individual Records for Members/Leaders

1. All individual records included on the ES237 Report (New, Returned, & Terminated) must have the following:
 - ✓ **Valid County Code--0**** (001 - Adams--039 - Yakima). All screens with the County Code field should have a valid 3-digit code entered. This code must be entered on the Preferences Screen, under Utility. A county code must be entered in Preferences to enter Group Enrollments or generate the ES237 report.

The command (under Utility/File Utilities/Utilities), 'Write County # to Data Files,' will write the County code saved in Preferences to every record. **This utility should NOT be used if your database records more than one county (Adams-Lincoln, Benton-Franklin, Chelan-Douglas).**

- ✓ **Valid Primary Club Code**--this must match a valid Club/Unit code and must also match at least one club/group to which the individual is linked, as displayed under the 'Clubs/Units' tab on the Member/Leader Screen.
- ✓ **Valid Project Code**--corresponds to Project Codes and current year projects are checked as 'Active.' All projects in the Master Project File must have a Federal ES237 Project Code to count statistically.
- ✓ **Required Fields**--Age, Grade, Residence, Gender, Race for Members, (+ Leader Type for Youth Leaders); Residence, Gender, Race, Leader Type for Adult Volunteers.

B. Special Report for Isolating Missing or Invalid Club Links

There is a built-in report to isolate club links problems that will cause your ES237 Report to not balance. If records are found, go to the individual record and look for missing or inconsistent club/unit links. (The Primary club at the top of the record must match a linked club under the club tab near the bottom of the record.)

Go to **Reports/Special Reports/Invalid Primary Club Code Report**. Check Categories – Members, Cloverbuds, all Leader types, and Status – New, Returning, Terminated. It's a good thing if nothing appears on the report!

C. Using the Query to Isolate Missing Required Data on Individual Records

1. Leader Type – for Adult Volunteers

Go to File/Member Query. Click on File/Filter. Narrow your database by defining the following field values:

Category: **G or P or A or R**

Status: **N or R or T**

DirectVol: **false**

InDirectVol: **false**

MidManager: **false**

Scroll over in the filtered query until you see the fields: DirectVol, InDirectVol, MidManager. To check a field, click on the box and use the space bar to insert a checkmark. Then Tab out of the box to move on to the next field. (If no records display, you have no records that match the criteria – or you've typed in an invalid field value.)

2. Leader Type – for Youth Leaders

Go to File/Member Query. Click on File/Filter. Narrow your database by defining the following field values:

Status: **N or R or T**

YthLeader: **true**

DirectVol: **false**

InDirectVol: **false**
MidManager: **false**

Do the same procedure described above to indicate a Leader Type for Youth Leaders. **Youth Leaders are Members serving in leadership roles, not adults leading youth.** Therefore, all Youth Leaders should have the category M (Member). If some on the list are really adult leaders, uncheck the Youth Leader field, using the mouse or the space bar.

WHY IS THIS IMPORTANT? Your adult and youth volunteers are reported on the ES237 report by Leader Type. If no Leader Type is saved to the record, the record does not count toward your volunteer statistics and your leader enrollment will be underreported.

3. Missing Grades for Youth

Go to File/Member Query. Click File/Filter. Narrow your database by defining the following field values:

Status: **N or R or T**

Category: **M or C**

Grade: (field value, not range) -1

You can double click on displaying records, one at a time, and go into each record and enter a valid grade. Save the record, then return to the Query by clicking on Exit. If you don't know the Grade and the age is recorded, enter a reasonable guess. Grade is required for ES237 reporting.

WHY IS THIS IMPORTANT? Records without Grades will report as 'Not in School' on the ES278 Report, misrepresenting your Grade distribution.

4. **Inaccurate Residence Fields** – residence of member/leaders may have been inaccurately entered or need to be changed with an address change. If you're a rural county, all records may fall under either Farm (1) or Town under 10,000 (2). An urban area may have very few records with residence 1 or 2. The file, <http://www.ofm.wa.gov/pop/april1/finalpop2009.pdf>, is a current reference for estimated 2009 population by county/town.

To use the Query to check residence fields, go to File/Member Query. Click File/Filter. Narrow your database by defining the following field values:

Status: **N or R or T**

Category: **M or C**

Residence: 3 (or 4 or 5) – these are the residence fields that are clearly definable; 'Farm' and Rural are not so clearly defined.

This will give you (for example) all Youth with residence listed as 3 (Towns, 10,000-50,000); or all Youth with residence listed as 5 (City over 50,000). Look at the towns that show up under a certain residence field. Is the residence field

accurate for this group of towns/cities? Residence 3 and 5 are very definable and can be reported with accuracy. You can edit a field right on the query screen and correct inaccurate records.

WHY IS THIS IMPORTANT? Widespread residence inaccuracy can skew the residence representation for your county, and in turn, for the state.

*****If you need help using the Query to make corrections, please give me a call*****

D. Verification Report

Checks required data for individually-enrolled Members/Leaders

Print the Verification Report (go to ES237, then ES237 Verification) to review required data on all member/leader records. It is useful to print the report just for youth (Members & Cloverbuds) and then just for leaders (General, Project, Activity, & Resource).

If you've used the Query to check for missing or inaccurate data, as described in section C., the Verification Report checking is not necessary. This is just another way of looking at your data.

E. Check Unit (Club/Group) Count/Delivery Mode for Individual Clubs/Units

More errors are made on the Club information than any other data contained in the ES-237 Report. To double-check a couple of areas where common data errors occur, do the following report.

1. Go to **Report/Statistical Reports**. Then select **Volunteer/Youth Group Statistical**. Select: Youth Group; Group/Member Combined; Sort Order – Club Code; Report Type – Ethnic/Race; Style – Detail Report. Enter the club range to include all clubs/units in the Club/Unit Code File. Preview the report and Print. Now go to **File/Club/Unit Codes**. Scroll through your clubs/units and check them against the report you just printed.
2. **IF the club/unit is not on the Statistical report you ran (item E.1.), it means no members are enrolled in the group (but there may be leaders). The Delivery Mode for that group in the Master Club File must be marked "Not a Youth Group Unit."**

WHY IS THIS IMPORTANT? If you don't check your valid youth Units, your Unit count on the ES-237 report may be inflated, because "empty" or leader-enrolled only groups will count as youth units, even though there are no youth linked to them.

F. Check Unit (Club/Group) Integration

1. Use the same Statistical Report generated above (under E.1.) to verify that correct information has been entered in the Club Code file in the club/unit integration fields.

2. Again, go to **File/Club Code**. Scroll through the clubs on the list, looking at the ethnicity/race of the membership, using the report generated above as your reference.
 - ✓ **If more than one ethnic group or race** is represented in the **youth membership**, the unit should be checked as **'Integrated.'** **An integrated club ALWAYS occurs in a Mixed Community.** It is impossible for a community to be Non-Mixed and to contain an Integrated Group. Most communities in WA are mixed; meaning the potential 4-H youth audience is composed of more than one ethnic group.
 - ✓ **If only one race** is represented by the youth enrolled in the club/unit **the group is 'Not Integrated'.**

(Adult leaders don't change the ethnicity of a club/unit for reporting purposes; club/group integration is based on youth enrollment.)

WHY IS THIS IMPORTANT? Errors or blanks in these fields will throw off your numbers on the ES-237 Report, Item 13.1-13.2.

G. Check Group Youth Enrollments

Another area where errors are commonly made is on the Youth Group Enrollment records. Go to **ES237/Youth Group Enrollments**. Youth Group records involve three (3) pages of data. Scroll through the records or preview/print the Youth Group files (go to ES237/Print ES237 Group Files; then select Youth and a sort option) to check the data.

1. Be sure all Group Enrollments have your **valid County Number** on each record and include records from the current 4-H year only.
2. Group Enrollments should usually be **marked as Project**, rather than Activity or Other, with a **valid Project Code** entered (e.g., Project, DEAA Challenge). If an entered Project Code doesn't display a valid Project Name, it means the project code has not been entered in your Master Project File.
3. Group Youth Enrollments should represent a **minimum of 6 hours** of youth audience contact to be counted as 4-H. This may represent 3 2-hour sessions in a classroom; or 6 1-hour sessions of a summer day camp; or a 1-day, 6-hour project. Time included can also reflect introduction and follow-up that may be done by a classroom teacher or other instructor, to complement a school enrichment experience coordinated by Extension personnel or volunteers. **Instruction/project hours should not include preparation time by the Extension professional or volunteer. If less than 6 hours of contact is indicated, mark the record "Group Activity - Less than 6 hours." This will leave the record in your database, but it will not be tallied on the ES237 report.**

4. Check that the **Delivery Mode is appropriate for the group and consistent with the designation in the Club/Unit Code File**, if a Club/Unit Code has been assigned to the group.
5. Check that the **Unit count is appropriate** (a Unit is a group, class, or club containing youth). Units do not mean numbers of sessions, hours of programming, nor numbers of youth. **Unit count should never equal or exceed the number of youth reported. Most often, unit = 1.**
6. Double check that **Duplicates are appropriately documented**. Duplicates are any participants who have been previously reported on an individual or group record. If the same classroom/school is reported more than one time, it likely represents duplicates. **Each youth served should be reported only one time in the database.**
7. If used (under Grade), **Post HS** refers to youth who have graduated, but are still 4-H age; **Not in School** refers to youth who are eligible for 4-H, but not enrolled in a school setting; **Special** refers to Special Ed. participants. Don't use any of these fields to report Adults who participate with a youth group. **Adults should NOT be included on the Youth Group Enrollment record.**
8. **All reported youth are either Hispanic or Not Hispanic, in addition to Race.** Hispanic participants are most often Hispanic/White. The field, 'Balance' is for youth who do not report another possible category; 'Balance' is NOT a subtotal of the column.
9. **Integration/Mixed Community fields must be checked appropriately.** If the group is composed of **more than one race**, it is '**Integrated.**' If 'Integrated' is checked, then 'Mixed Community' must also be checked. The software will allow you to save errors in the integration field on group enrollment records (unfortunately).

H. Check Volunteer Group Enrollments

1. Go to **ES237/Group Volunteers**. Some counties will not use these records at all. This is where Indirect volunteers are entered who are not individually enrolled. It is used primarily for school teachers or short-term 4-H volunteers who are screened by other agencies and for whom WSU has no liability responsibility.
2. Group-enrolled volunteer records should include a valid county code, project or activity code, and include records from the current 4-H year. Typically volunteer group records (if used) correspond to youth served and entered as youth group records.

I. Check Training Log

Each county should have records for training conducted during the year. These can include New Leader Training, Project Leader Training, Leadership Training, or any training offered to youth, adult volunteers, or non-4-H participants.

Generating the ES-237 Report

After checking your data as described above and making corrections as needed, go to ES237, then ES237 Statistical Report. You have the option of printing different combinations of data or generating the combined/final report. **Don't let the word 'final' scare you**—you can generate/preview/print the combined report as many times as you need to as you verify and check your numbers. A better word would be 'complete report' as opposed to a partial report of data (usually used to narrow down errors).

The advantage of having the option of running the report by a range of clubs, for member/leader (individually enrolled) records, or for group data, is that you can isolate the part of your report that doesn't balance, if necessary. Also, offices entering data for two counties can run separate ES-237 reports for each county (Chelan/Douglas, Benton/Franklin) for individually enrolled members and leaders.

What if my report doesn't balance?

The previous reports and checks recommended will eliminate most, if not all problems that may cause your report to not balance. However, if there are areas of your report that do not balance, refer to the Blue Ribbon Manual on the 2.6 CD, Section 6-20 – 6-23, to pinpoint possible problems – or give me a call.

Be sure to print and distribute a hard copy of your ES-237 Report to your District Director, County Chair, and all Extension staff/personnel involved in delivering 4-H programs in your county. These are important statistics and represent a year's worth of effort by many individuals.

****For more details on the ES237 Report, see the Blue Ribbon Manual, Section 6. ****

Transfer Data & ES-237 Files to State

- A. Follow the directions posted on the 4-H Website, <http://4h.wsu.edu>, under the link "Blue Ribbon Users" and then "Data Transfer." These directions are the same as for previous data transfers this year. If you have trouble transferring your files, please contact me or Leila Styer at (509)335-2967.

******The file transfer DUE DATE for all Counties is SEPTEMBER 15, 2008.******

Data Files to send to State:

ALL YOUTH*.DB FILES + ES237P1.db, ES237P2.db, ES237P3.db, & ES237P4.db

***NOTE: You must generate your COMBINED/FINAL ES237 before your data transfer.**

- B. The last ES237 report generated is the one saved in the ES237 .db files, meaning if you ran a partial report just before transferring your data, I will receive that partial report.

- C. ****NOTE: You must send ACTIVE data files. DO NOT turn your database to Inactive (i.e., do not do Year-End Processing) before transferring your 4th Quarter Data, including the ES237 files.**

Optional Statistical Reports

There are many combinations of statistical reports possible. It is worthwhile to take time to print some of these reports, reflecting the entire year's statistics, before jumping into the new 4-H year. If you don't, and need statistical information later, it is more difficult to recreate 2007-2008 4-H year reports. Reports can be printed in hard copy and/or saved as files for future use or reference. Always save the complete dataset for the year ('07-'08) before turning your files inactive for the new year ('08-'09).