Branch Officers Report (BOR)
Branch Instructions & FAQ

Purpose
AAUW California maintains a database of California branch leaders and state committee members to facilitate communication between the AAUW state board and branch boards. The information is used to produce:

- **Job-specific email distribution groups** which are used to send important email messages from the state organization to branch officers.
- **Annual print and online directory** of state and branch leaders. The directory is distributed annually to branch presidents and state committee members and is available on the state website. Please note that not all branch leadership positions are listed in the directory.

Your role
Branch presidents and/or presidents-elect must update the BOR annually by **July 1st** to assure that we have the correct contact information for each branch. You are requested to:

- Update officer listing.
- Confirm officer contact information is correct and update as necessary.

The deadline for completing the AAUW CA BOR is July 1, 2019.

Questions can be directed to **office@aauw-ca.org**.

Before you begin

- Have your BOR login and Password available. It was sent to you via email. If you cannot locate it, contact the office at 916-448-7795 or via email at: office@aauw-ca.org.
- Have a list of your current officers including their mailing address, email address, position(s), and phone number available.

AAUW National maintains a separate Member Services Database (MSD). Both the national and state records need to be updated annually.
You can access the BOR in three ways.
1. Click here.
2. Type http://bor.aauw-ca.org/index.cfm?go=bor.home into your internet browser address bar
3. Access it on the AAUW California website on the CA Business page.

Enter your user ID and password.
- Branch presidents and presidents-elect were sent an email containing their individual username and password to log into the BOR system. This login information was randomly generated and is located at the bottom of the email.
- The president may choose to delegate this responsibility. The username and password can be given to another branch member, which will allow that person to enter the data.

If you do not have access to the login information, contact Julika Barrett, at 916-448-7795 or via email at: office@aauw-ca.org
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Choose your branch from the dropdown list.</td>
</tr>
<tr>
<td>2</td>
<td>Press Enter</td>
</tr>
</tbody>
</table>

**Branch Officers Report**

Greetings, Julika

Welcome to the Branch Officers Report (BOR) system for AAUW California. In order to update your branch listing, please have your list of officers, including their contact information available. Choose your branch below to begin updating the list of officers for your branch.

1. Select individuals who have previously served as an officer:
   - Remember to review and update their contact information.
   - Start by clicking the “allnames” button before you begin. This will expand the list of Leaders to show everyone.
   - Only add someone who is not already on this list.

2. Add new names as needed if the person has not previously served as an officer.

You can return to edit your branch officer list as many times as you need to, however, the deadline for completion is **Jul**. You will not be able to remove any names from the Leader List. If you are aware of anyone who has moved away, please contact the office.

If you need help, contact the office at 916.448.7795 or email office@aauw-ca.org

Select a branch to continue:

- Los Altos-Mountain View
- Los Gatos-Saratoga
- Madera
- Marin
- **Mariposa**
- Marysville-Yuba City
- Merced
- Mid California

Enter
Choose an officer from the list (either the last 2 years or all names).

To add a new leader to the list, click **Add New Leader**.

View the roster to verify your report.
**Branch Officers Report (BOR)**

**Branch Instructions & FAQ**

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### Use an Existing Record to Select a Leader

1. **Choose the leader from the list on the left.**
2. **The existing position (record) displays.**
3. **Choose the new position(s).** Checking the “All Communication” box means the leader receives any message sent from the State Board. You may choose several positions.
4. **Update contact information.**
5. **Click Update Information Now link.**
6. **In the pop-up window, click OK to accept or Cancel to continue making corrections.**
If you do not see the individual, click on **Add a New Leader**.
Add a New Leader’s Contact Information

1. Enter contact information.

2. Choose the leadership position(s).

3. Add Now to save the record.

4. Click on the Return to Branch Leadership List for more entries.
Choose **View roster** to verify and confirm your report for the current or next year.

### Branch Officers Report

**Recent Branch Leaders**
- Maddie Brown
- Trish Darcey
- Bernadette Falany-Davis
- Sandra Gabe
- Cindy Harp
- Dawn Johnson
- Dina Lambert
- test last
- Rebecca Mock
- Kim Monson
- Cathy Owens
- Jill Rowney
- Barbara Silva
- Rebecca Swisher
- Molly Wilson

#### Update the branch’s leadership information for the coming year

1. **Assign a position to a person who appears on the branch’s leadership list.**

   Select a name on the left and click on it. The person’s information will be displayed. You may update the contact information and assign position(s) for the next year. You can view either the last 2 years or all previous branch leaders by clicking the button at the top of the list.

   OR

2. **Assign a position to a person who does not appear on the branch’s leadership list.**

   Click on **Add New Leader**. In the blank display add the person’s contact information and assign position(s) for the next year.
Clicking on the **Update Information Now** takes you back to the main screen of **Recent Branch Leaders**.

1. Click on **View roster** to print or view the branch officers’ list.

2. The branch officers’ view screen appears. Choose the fiscal year you wish to print. Click on the print icon or the pdf. Document to print.
Choose the year that you would like to print.

Year 2019 = 2018-2019
Year 2020 = 2019-2020
(Upcoming fiscal year)

Select the **Print** icon to print the screen information or the **PDF Document** to save, view or print.
<table>
<thead>
<tr>
<th>What You Will See If You Print or Download the Roster</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>What you will see if you choose to Print.</strong></td>
</tr>
<tr>
<td><strong>What you’ll see if you choose PDF.</strong></td>
</tr>
</tbody>
</table>

1. Download the file.
2. Print the file.
## Branch Officers Report (BOR)
### Branch Instructions & FAQ

<table>
<thead>
<tr>
<th>Answers to Frequently Asked Questions</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>What if I assign a job to a person in error?</strong></td>
</tr>
<tr>
<td>Each person’s information can be updated repeatedly.</td>
</tr>
<tr>
<td>To “un-assign” a job for a leader, follow these steps.</td>
</tr>
<tr>
<td></td>
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<tr>
<td></td>
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<tr>
<td><strong>How do I remove a person from a previous position from a previous year?</strong></td>
</tr>
<tr>
<td><strong>How do I delete a person from the branch leadership list?</strong></td>
</tr>
<tr>
<td><strong>How do I correct the spelling of a name?</strong></td>
</tr>
<tr>
<td><strong>What if a person shows on the branch leadership list multiple times?</strong></td>
</tr>
<tr>
<td><strong>Our board has a position that is not listed. How do I tell you about it?</strong></td>
</tr>
</tbody>
</table>
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## Branch Instructions & FAQ

<table>
<thead>
<tr>
<th>Questions</th>
<th>Answers</th>
</tr>
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<tbody>
<tr>
<td>Our branch does not have anyone holding one of the positions you ask about. <strong>Should I leave the position unassigned?</strong></td>
<td>It depends on what it is. If it is for an optional responsibility, such as Speech Trek, then do not assign anyone. However, if you have no one assigned to an essential task, such as Finance or Program, please assign the position to the person who will be receiving communications from AAUW CA about those responsibilities. If you later find a person to take over the position, send the new person’s information to <a href="mailto:office@aauw-ca.org">office@aauw-ca.org</a>.</td>
</tr>
<tr>
<td>Why does my branch roster not show all the positions?</td>
<td>The branch leadership roster that you see when you “Click here to verify...” only shows the positions that you have filled for the specified year. Unfilled positions are not listed.</td>
</tr>
<tr>
<td>Someone else started to complete the BOR for my branch. <strong>Can I finish the job?</strong></td>
<td>You certainly can. The BOR for a branch does not have to be completed by one person or all at one time.</td>
</tr>
<tr>
<td>How many times can I update the BOR?</td>
<td>The BOR system may be entered as many times as necessary before the July 1st completion deadline. Information may be added or corrected each time.</td>
</tr>
<tr>
<td>When is the BOR data transmitted to AAUW CA?</td>
<td>Any information you enter through the BOR system immediately updates the AAUW CA leadership database. After the deadline, administrators will process the BORs and assign email groups to the new officers. Until that time, the current year officers will receive the email broadcasts.</td>
</tr>
<tr>
<td>I have a question that isn’t answered here. <strong>How do I get an answer?</strong></td>
<td>If your question is not answered by these instructions, please contact <a href="mailto:office@aauw-ca.org">office@aauw-ca.org</a> so this document can be updated. If you have the question, others probably do too.</td>
</tr>
</tbody>
</table>