



AAUW California Member Participation Tracking Tool

Instructions

Summary Steps - scroll down for step-by-step directions and examples

Set up your spreadsheet

1. Download your branch roster from AAUW National.
2. Copy your roster in to the **Member Roster** tab in the spreadsheet.
3. Make any sorting changes to your list at this time. If you sort the list later, your attendance will not match as it will only sort the member columns and not the attendance columns on the other sheets.
4. Enter the dates of your meetings/projects etc.

Enter your branch information

1. Decide which tabs to use. We have created several general categories for you to choose from. Use them in whatever way matches your branch's activities. For example, Meetings and Programs may be the same in your branch, so choose only one of those tabs to update. Use as many or as few tabs as you like.
 - a. Meetings
 - b. Interest Groups
 - c. Projects
 - d. Programs
 - e. Events
 - f. Fundraisers
2. Enter your branch results on the appropriate tab.

For the Geeks in the branch

- Direct questions to webteam@aauw-ca.org.
- The spreadsheet uses the member roster to populate each of the participation tabs. If you change any of the information on that tab, it will be reflected on all of the other tabs.
 - The roster uses the format from the AAUW National Member Services Database (MSD).
 - You can manually enter the information. The First and Last Name columns are the only ones used. You can leave the others blank.
 - To add a member after the initial loading – add them at the bottom of the list.
- The spreadsheet is set up for a large branch (300 members).
 - You can hide the rows you don't need.



AAUW California Member Participation Tracking Tool Instructions

- If you have more than 300 members, contact webteam@aauw-ca.org for assistance.
- All cells that are not available for input have been locked for safety. The password is AAUWCA.
- You can change the width of columns.
- You can delete columns
- If you add columns, you will need to change the formulas in the far right column. Contact webteam@aauw-ca.org for assistance.
- To calculate the length of membership, use the following formula: $\text{=(TODAY()- Join date cell reference)/365}$



AAUW California Member Participation Tracking Tool

Instructions

Step by Step Instructions – Set Up

Download your branch roster from the AAUW National Member Services Database at AAUW.org.

IF YOU HAVE MORE THAN 300 MEMBERS STOP AND CONTACT WEBTEAM@AAUW-CA.ORG FOR INSTRUCTIONS.

Open the branch roster. There is only one tab.

Copy all of the data from the spreadsheet. You can highlight it all by pressing Ctrl/A.

The screenshot shows an Excel spreadsheet titled "memberroster (1).csv - Excel". The ribbon includes FILE, HOME, INSERT, PAGE LAYOUT, FORMULAS, DATA, REVIEW, VIEW, DEVELOPER, Ablebits Data, Ablebits Tools, and Ablebits Data. The spreadsheet has columns labeled A through P. A red box highlights the top-left corner of the data area (cell A1). A red arrow points to the "Copy" option in the right-click context menu. Another red arrow points to the "Copy" option in the right-click context menu. A red box highlights the "Copy" option in the right-click context menu. A red box highlights the "Copy" option in the right-click context menu.

1 SELECT ALL CELLS.
Click here to highlight all cells.
OR
Click Ctrl/A to select all cells.

2 COPY ALL CELLS.
Right click on your mouse to bring up this window. Choose COPY.
OR
Click Ctrl/C.

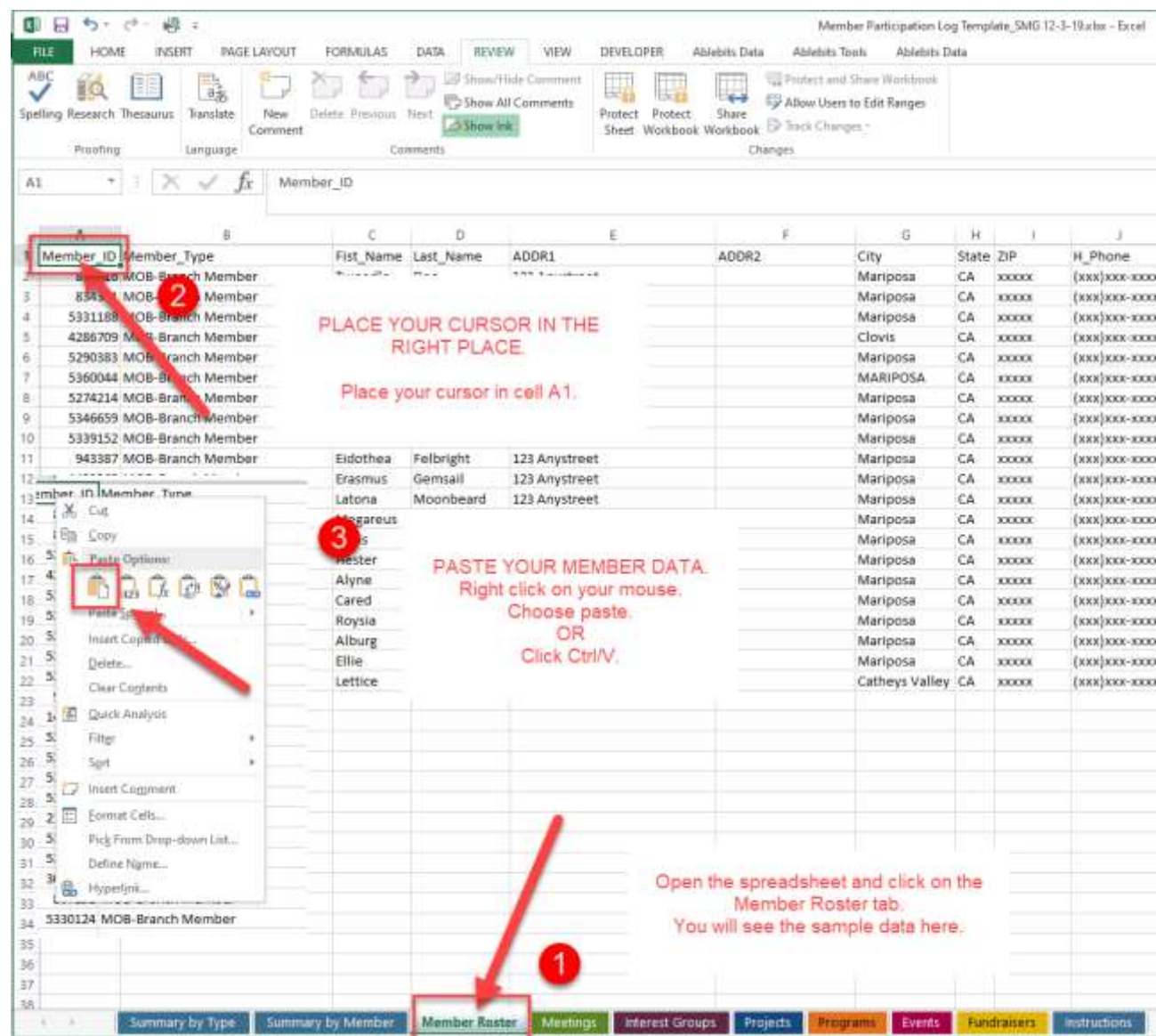
AAUW California Member Participation Tracking Tool

Instructions

Navigate to the Member Roster tab in your branch spreadsheet.

Place your cursor in cell A1 (top left)

Paste (Ctrl/V) the information from the AAUW National Member Services Database. This will replace the existing fake member data in the spreadsheet.



The screenshot shows the 'Member Participation Log Template_SMG 12-3-19.xlsx' spreadsheet. The 'Member Roster' tab is selected at the bottom. The spreadsheet has columns for Member ID, Member Type, First Name, Last Name, ADDR1, ADDR2, City, State, ZIP, and H_Phone. Red annotations and numbers guide the user through the process:

- 1**: Points to the 'Member Roster' tab at the bottom.
- 2**: Points to cell A1, with the text 'PLACE YOUR CURSOR IN THE RIGHT PLACE. Place your cursor in cell A1.'
- 3**: Points to the 'Paste' option in the right-click context menu, with the text 'PASTE YOUR MEMBER DATA. Right click on your mouse. Choose paste. OR Click Ctrl/V.'

Additional text at the bottom right says: 'Open the spreadsheet and click on the Member Roster tab. You will see the sample data here.'



AAUW California Member Participation Tracking Tool Instructions

Step by Step Instructions – Entering Member Results

Choose the tab that reflects the type of activity you want to document.

Enter your specific event/program/project information:

Note member involvement by placing a 1 in the cell that represents the member activity. A member is considered to have participated if they played any role in the activity, including just attending.

The screenshot shows a spreadsheet interface for tracking member participation. The top header bar is green and contains tabs for different activity types: Summary by Type, Summary by Member, Member Roster, Meetings, Interest Groups, Projects, Programs, and Events. The 'Member Roster' tab is currently selected. Below the tabs, there are columns for Member #, Last Name (From Member Roster tab), First Name (From Member Roster tab), and several columns for entering event names and dates (Enter Event Name #1, Enter Event Name #2, Enter Event Name #3, Enter Event Name #4, Enter Event Date #1, Enter Event Date #2, Enter Event Date #3, Enter Event Date #4). The main body of the spreadsheet lists members in rows, with their last and first names in the first two columns. To the right of the names are columns for entering participation data. Red arrows and numbered circles (1, 2, 3) point to specific areas: (1) points to the 'Member Roster' tab, (2) points to the event name and date columns, and (3) points to the participation data cells. A yellow callout box explains that a '1' should be entered if the member participated, and a blank or '0' if they did not. A red callout box at the bottom left states that information from the Member Roster tab cannot be changed here.

Member #	Last Name (From Member Roster tab)	First Name (From Member Roster tab)	Enter Event Name #1	Enter Event Name #2	Enter Event Name #3	Enter Event Name #4	Enter Event Date #1	Enter Event Date #2	Enter Event Date #3	Enter Event Date #4
1	Dee	Tweedle								
2	Tallhart	Wynfreede								
3	Catlin	Guston								
4	Coppercarol	Bryde								
5	Krofang	Celestine								
6	Kecripler	Ismay								
7	Harpborn	Sighard								
14	Spiritsoul	Bakis								
15	Swiftgus	Hester								
16	Foxvipar	Alyne								
17	Smilestinger	Cared								
18	Tigertraveler	Roysia								
19	Redrazor	Alburg								
20	Siegefinger	Ellie								
21	Quickson	Lettice								
22										
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31										
32										
33										



AAUW California Member Participation Tracking Tool

Instructions

Step by Step Instructions – Reporting Member Results

The Summary Pages
(Summary by Member and
Summary by Type)
automatically
look at the
other sheets
and calculate
the totals.

Member #	Member Last Name (From Member Roster tab)	Member First Name (From Member Roster tab)	Enter Event Name #1	Enter Event Name #2	Enter Event Name #3	Enter Event
1	Dee	Tweedle	Enter Event Date	Enter Event Date	Enter Event Date	Enter Ever
2	Tallheart	Wynefreede				
3	Catrain	Guston				
4	Coppercarol	Bryde				
5	Herofang	Celestine				
6	Icecrippler	Ismay				
7	Harpborn	Sighard				
8	Scalebristle	Nicholas				
9	Emeraldhair	Irus				
10	Felbright	Eidothea				
11	Gemsail	Erasmus				
12	Moonbeard	Latona				
13	Bearcloak	Megareus				
14	Spiritsoul	Bakis				
15	Swiftgust	Hester				
16	Foxviper	Alyne				
17	Smilestinger	Cared				
18	Tigertraveler	Roysia				
19	Redrazor	Alburg				
20	Siegefingher	Ellie				
21	Quickson	Lettice				
22						
23						
24						
25						
26						
27						
28						
29		0	0			
30		0	0			
31		0	0			
32		0	0			
33		0	0			

Enter a 1
Enter a 1 in this field if
the member
participated.
Leave blank or enter a 0
if they did not
participate.

Summary Information
can be found on these
two tabs

Summary by Type Summary by Member Member Roster Meetings Interest Groups Projects Programs Events



AAUW California Member Participation Tracking Tool

Instructions

Step by Step Instructions – Summary by Type

Enter your branch information at the top of this page.

Entering the number of members in your branch will allow the calculation of % of membership participation.

Membership Participation Log

Branch:

Year:

Number of Members:

Participation by member

Meeting Participation	Interest Group Participation	Project Participation	Program Participation	Event Participation
0	0	0	0	0

% of membership participation

Meeting Participation	Interest Group Participation	Program Participation	Event Participation	Fundraiser Participation	Total
0%		0%	0%	0%	0%

Enter your branch information here.
1. Branch Name
2. The year you are tracking
3. The number of members

If you enter the number of members, the spreadsheet will calculate the % of participation for each category.



AAUW California Member Participation Tracking Tool

Instructions

FAQ

How do I download the branch roster from the AAUW National Member Services Database?

Someone in your branch (typically the finance officer) has access to the roster on their login. They should be able to download it for you. If not, contact connect@aauw.org and ask them to send you your member roster.

We use different names for our programs/events etc. What are our options?

You can decide to use the ones that work for you and ignore the other tabs.

OR

If you have a technical person in your branch, they can change the names. If you want to change a name, you should change it in all the places it appears in the spreadsheet.

- 1. On the tab*
- 2. Within that tab*
- 3. On the summary tab*

The Interest Group tab does not have room for dates. Why not?

This version of the spreadsheet only tracks whether a member participates in a special interest group. It does not track each activity within the special interest group.

-Continued-



You can insert as many columns as you like. Enter them BEFORE the last existing data column so that the calculations continue to work. If you add a column just before the “Total” column, it won’t be included in the totals.

-Continued-



AAUW California Member Participation Tracking Tool

Instructions

We don't have 300 members and we don't want to see all the blank rows at the bottom of the sheets. How to we remove them?

After you set up your member roster and know how many rows you're using, hide the unnecessary rows.

	A	B	C	D	E	F	G	H
1	Member_ID	Member_Type	Fist_Name	Last_Name	ADDR1	ADDR2	City	State
2	870816	MOB-Branch Member	Tweedle	Dee	123 Anystreet		Mariposa	CA
3	834331	MOB-Branch Member	Wynefreede	Tallheart	123 Anystreet		Mariposa	CA
4	5331188	MOB-Branch Member	Guston	Catrain	123 Anystreet		Mariposa	CA
5	4286709	MOB-Branch Member	Bryde	Coppercarol	123 Anystreet		Clovis	CA
6	5290383	MOB-Branch Member	Celestine	Herofang	123 Anystreet		Mariposa	CA
7	5360044	MOB-Branch Member	Ismay	Icecrippler	123 Anystreet		MARIPOSA	CA
8	5274214	MOB-Branch Member	Sighard	Harpborn	123 Anystreet		Mariposa	CA
9	5346659	MOB-Branch Member	Nicholas	Scalebristle	123 Anystreet		Mariposa	CA
10	5339152	MOB-Branch Member	Irus	Emeraldhair	123 Anystreet		Mariposa	CA
11	943387	MOB-Branch Member	Eidothea	Felbright	123 Anystreet		Mariposa	CA
12	1453265	MOB-Branch Member	Erasmus	Gemsail	123 Anystreet		Mariposa	CA
13	5274213	MOB-Branch Member	Latona	Moonbeard	123 Anystreet		Mariposa	CA
14	5271176	MOB-B	Megareus	Bearcloak	123 Anystreet		Mariposa	CA
15	5314628	MOB-B	Bakis	Spiritsoul	123 Anystreet		Mariposa	CA
16	5314629	MOB-B	Hester	Swiftgust	123 Anystreet		Mariposa	CA
17	2179889	MOB-B	Alyne	Foxviner	123 Anystreet		Mariposa	CA
18	5361752	MOB-B	Cared				Mariposa	CA
19	5360043	MOB-B	Roysia				Mariposa	CA
20	3047510	MOB-B	Alburg				Mariposa	CA
21	807151	MOB-B	Ellie				Mariposa	CA
22	5330124	MOB-B	Lettice				Catheys Valley	CA
23								
24								
25								
26								
27								
28								
29								
30								
31								
32								
33								
34								

Cut
 Copy
 Paste Options:
 Paste Special...
 Insert
 Delete
 Clear Contents
 Format Cells...
 Row Height...
 Hide
 Unhide

Highlight the rows you want to hide.
Right Click on your mouse.
Choose Hide.

You will have to do this on each sheet.

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