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.

- 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: =(TODAY()- Join date cell reference)/365

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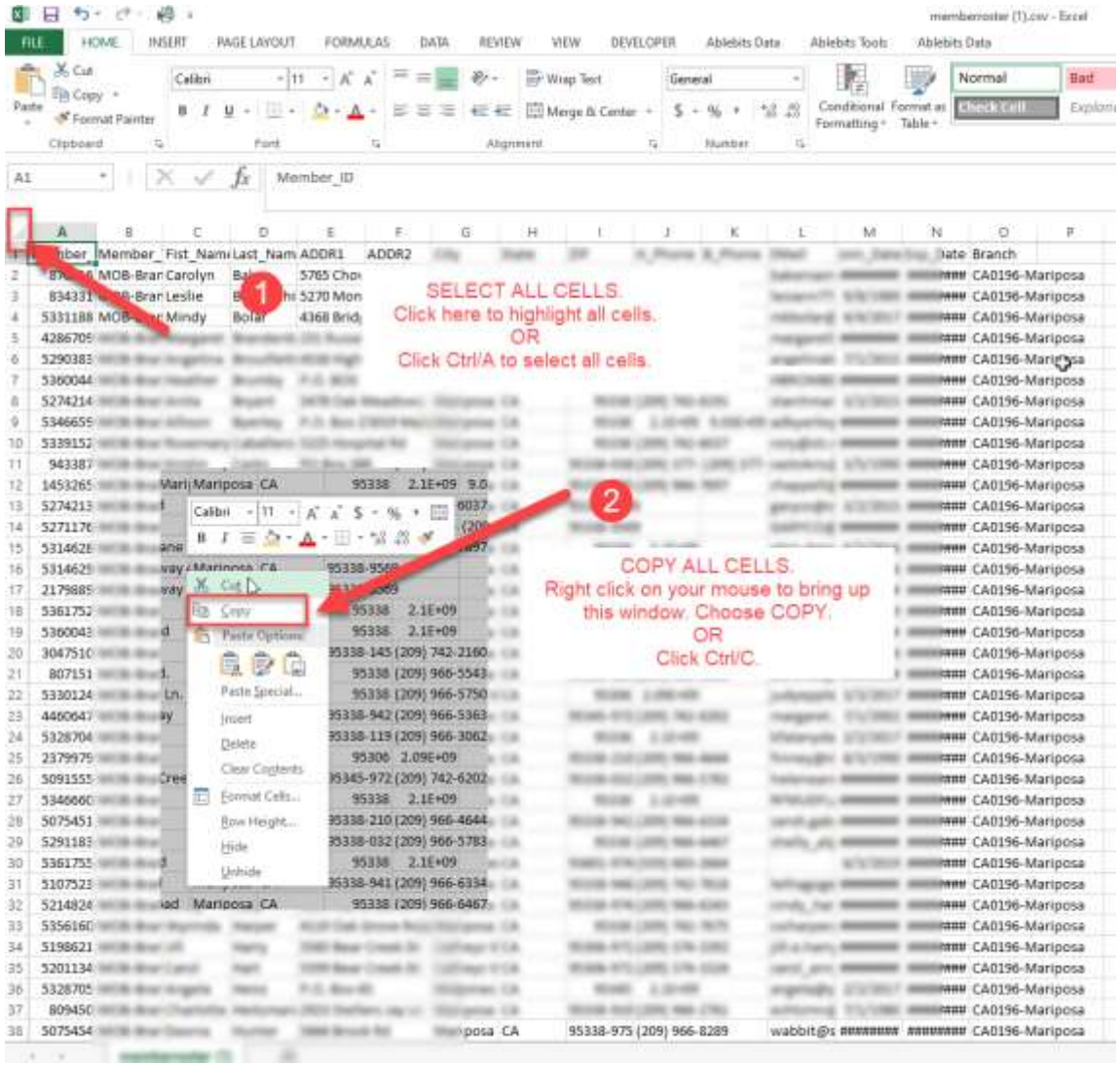
Step by Step Instructions – Set Up

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.



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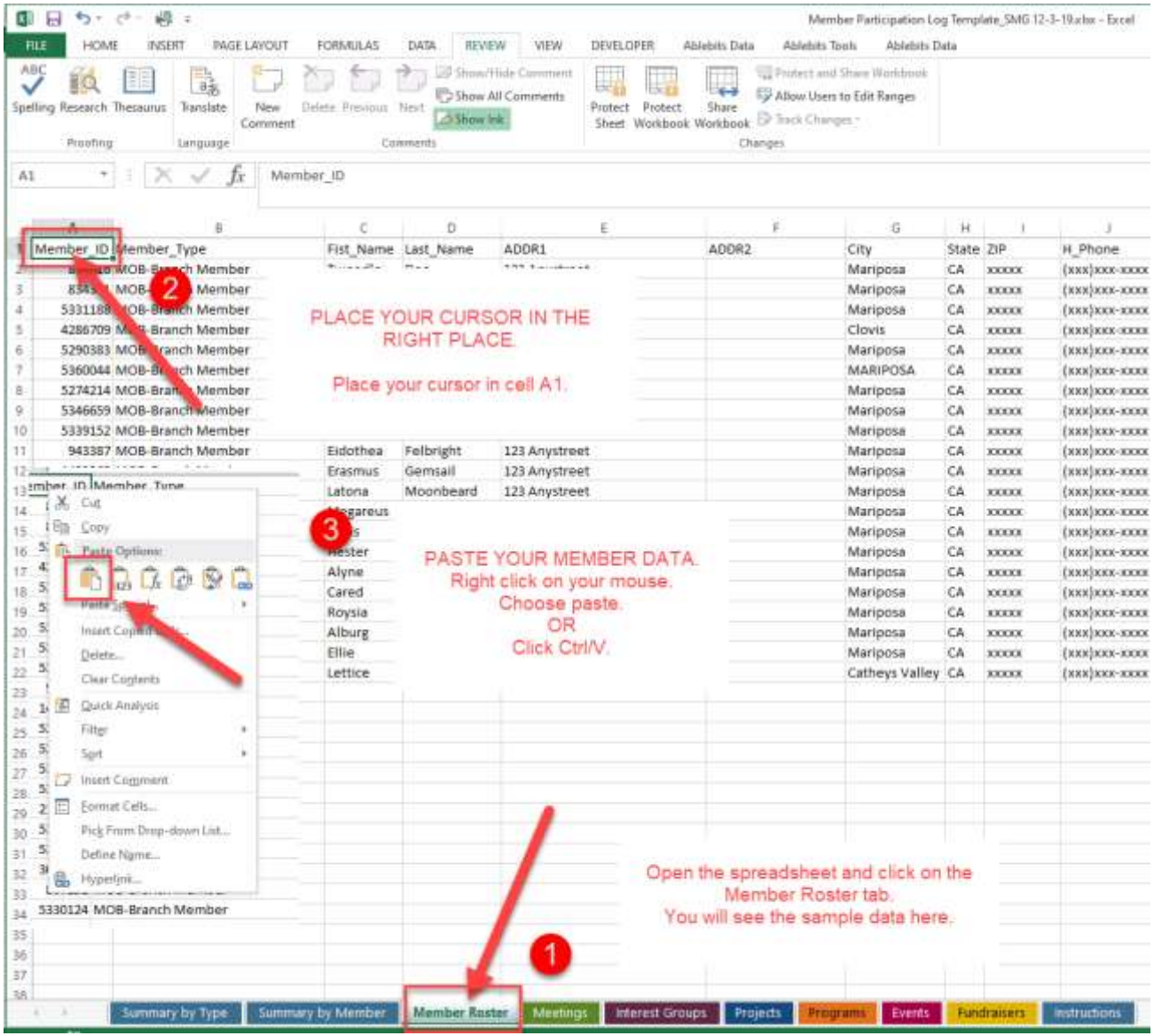
Navigate to the Member Roster tab in your branch spreadsheet.

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.



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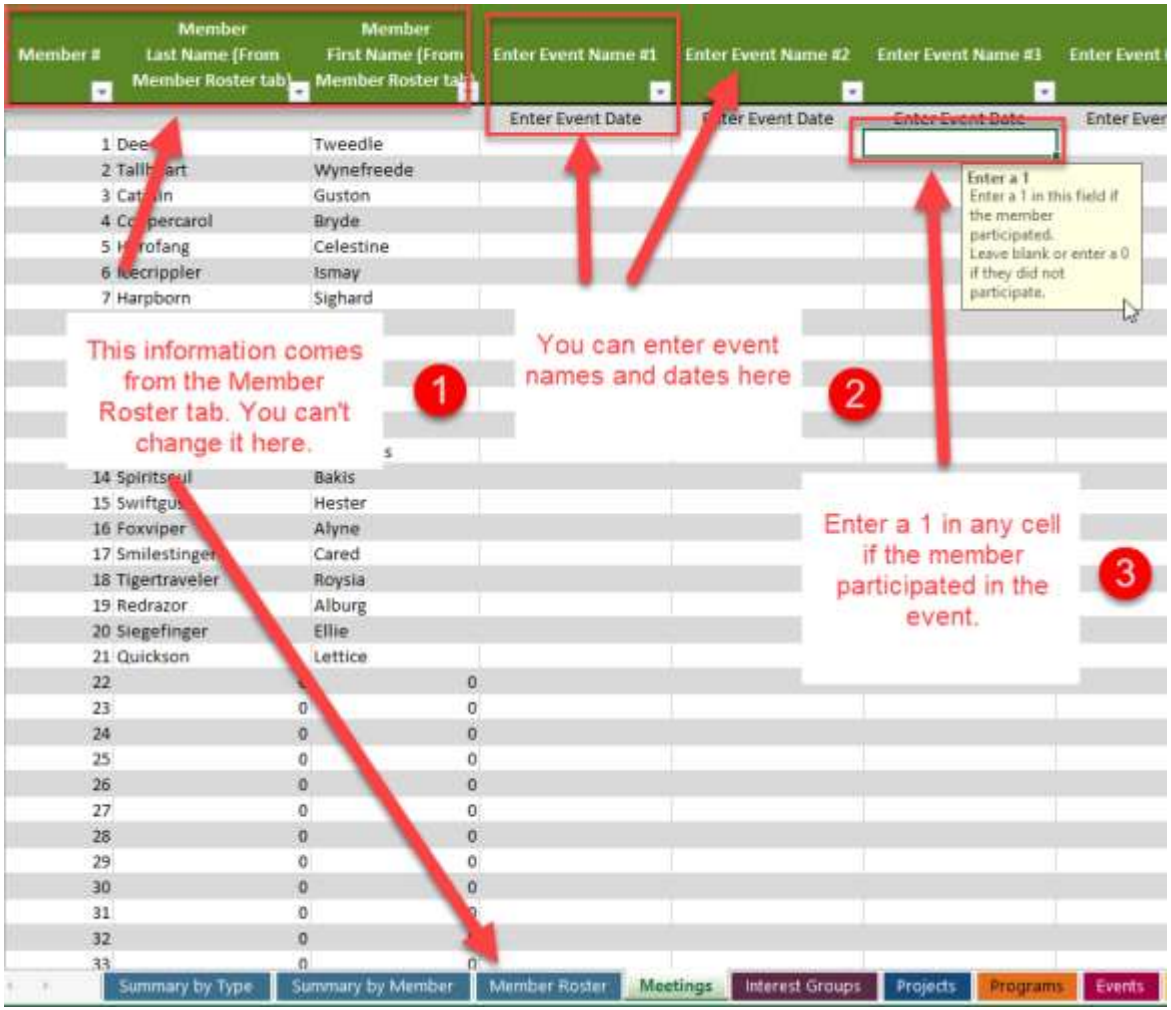
Step by Step Instructions – Entering Member Results

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.



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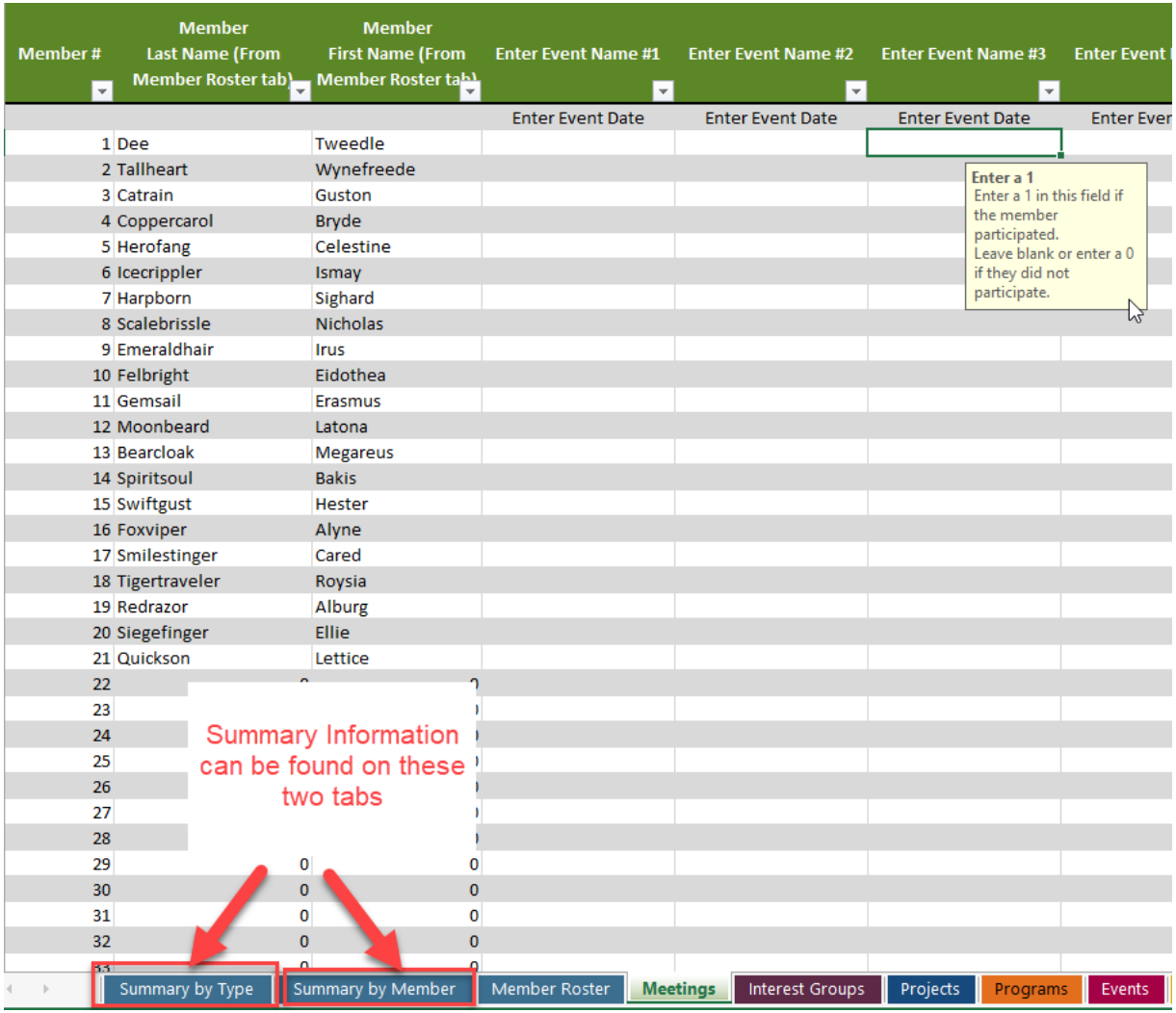
Step by Step Instructions – Reporting Member Results

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



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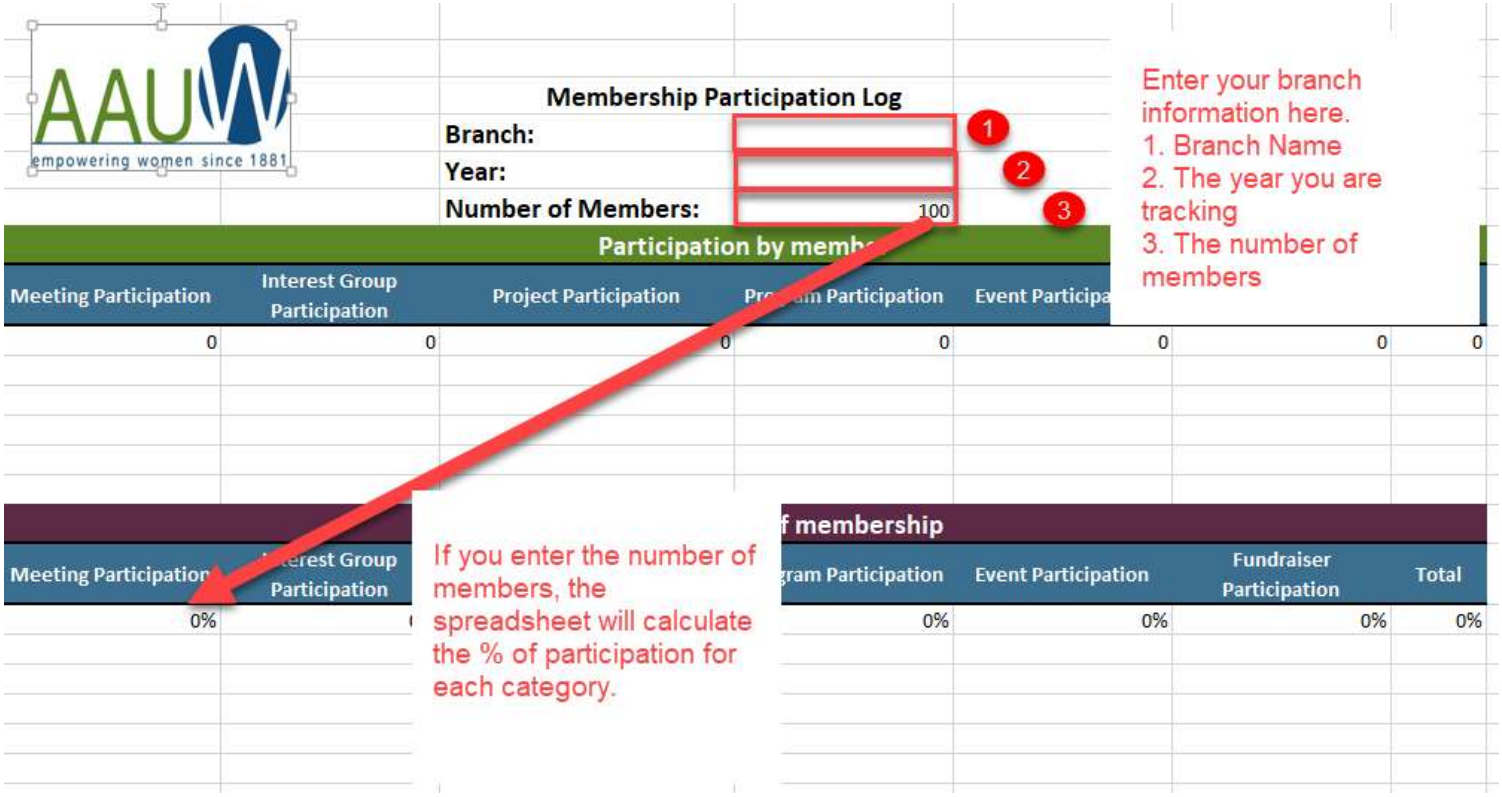
Step by Step Instructions – Summary by Type

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.



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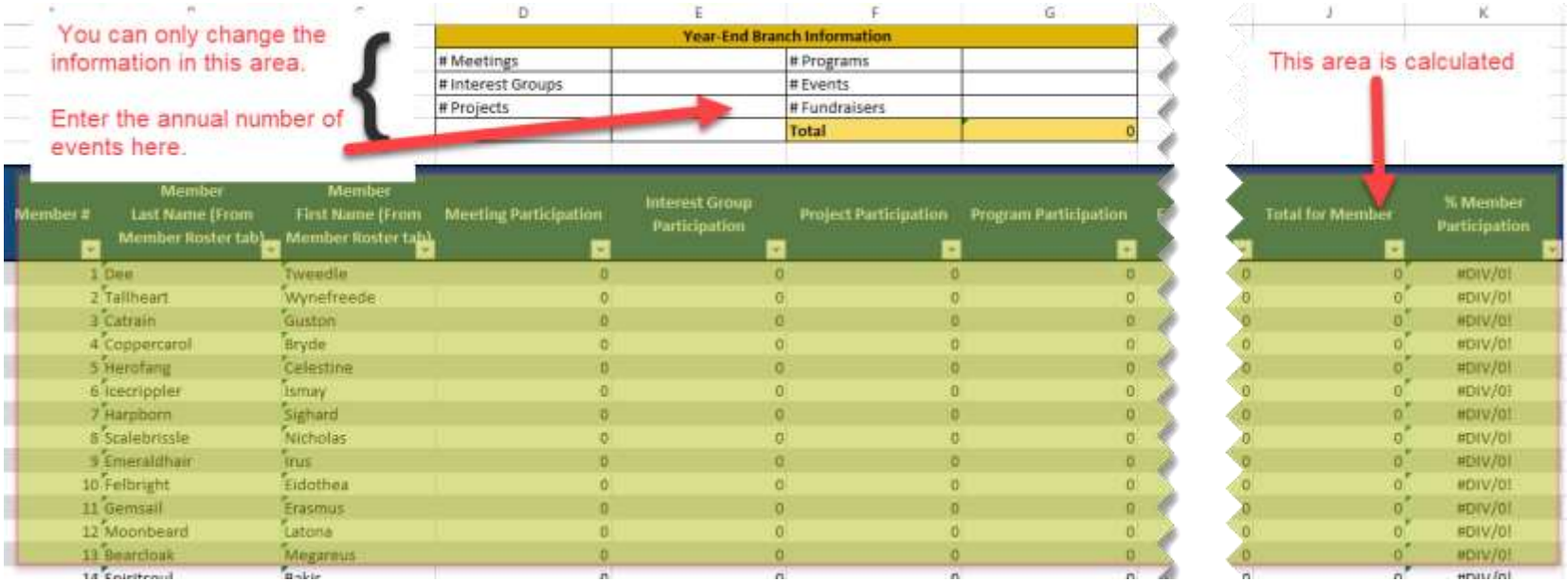
Step by Step Instructions – Summary by Member

There is a total at the bottom of each column on each tab (Meetings, Fundraisers etc).

This table provides a summary of activities by member.

If you enter the total number of activities (i.e. 10 meetings, 5 interest groups) at the end of the year the spreadsheet will also calculate the % of member participation. Members with less than 25% participation will be highlighted in yellow.



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*

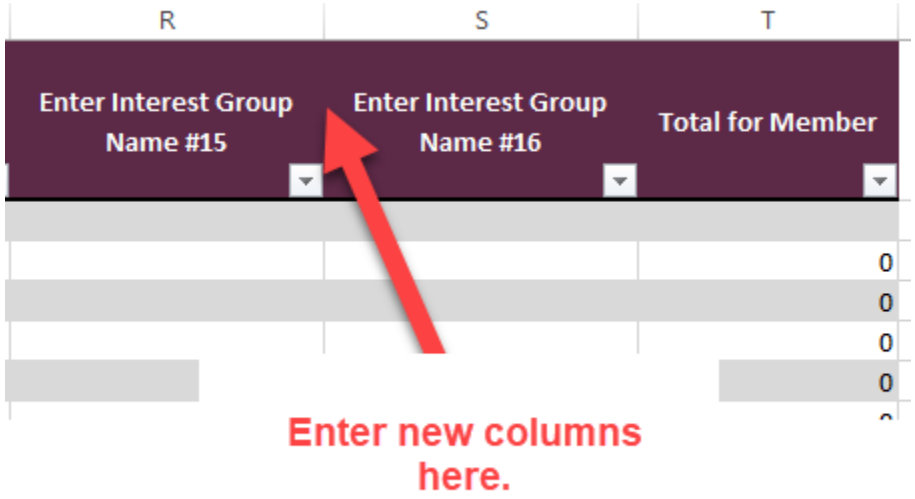
The Interest Group tab does not have room for dates. Why not?

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-

We have more activity to track and there are only 16 columns on the spreadsheet. How do I add more?

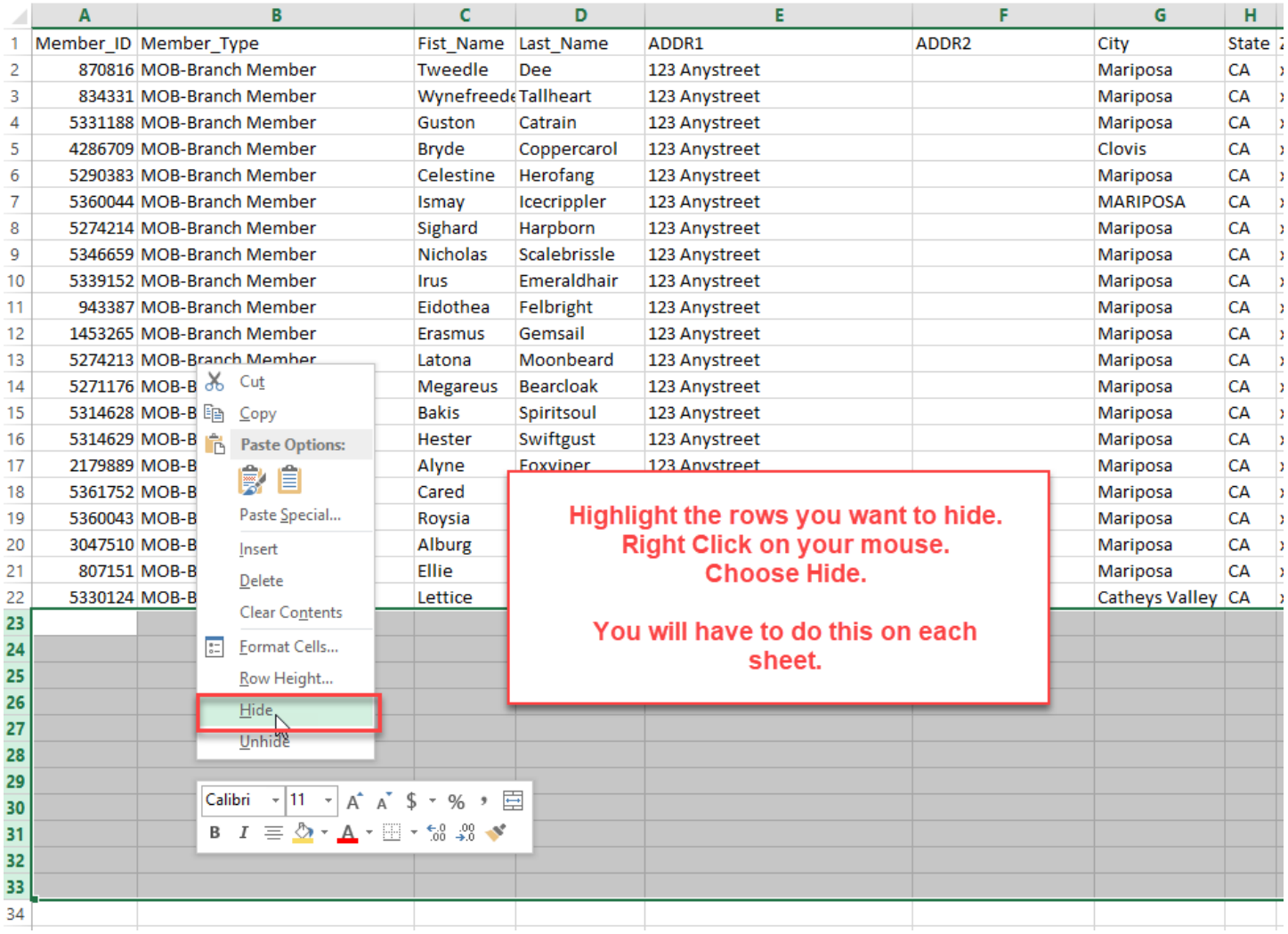
You can insert as many columns as you like. Enter them BEFORE the last existing data column so that the calculations continue to work. If you add a column just before the "Total" column, it won't be included in the totals.



-Continued-

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	Scalebrissle	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
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