



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.

AAUW National maintains a separate Member Services Database (MSD). Both the national and state records need to be updated annually.

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:

1. Update officer listing.
2. Confirm officer contact information is correct.

The deadline for completing the AAUW CA BOR is July 1st, 2017.

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

Before you begin

Have a list of your current officers including their mailing address, email address, position(s), and phone number available.

General Instructions

Login to the Branch Officer Report System

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 or
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 login to 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
Kim Wilber, Office Manager,
at 916-448-7795
or via email at: office@aauw-ca.org



Branch Officers Report bor.aauw-ca.org

Please login with your username and password or contact the webmaster (office@aauw-ca.org) if you need help.

Username:

Password:

Typing <http://bor.aauw-ca.org/index.cfm?go=bor.home> into your browser will bring you to this page. Enter the username and password that was at the bottom of the email you received about doing the BOR.

This is the place to login and submit a Branch Officers Report (BOR) telling AAUW of California how your branch is doing. A BOR report is requested by National AAUW.

- Usernames and passwords were sent in an email broadcast to all 2015-16 branch presidents.
- Each person has a unique username and password. You should find it at the bottom of the email.
- If the president decides to delegate the BOR job to another branch member, she can give the login information to that person.

The deadline for completion is July 1st 2017. Click [here](#) if you need to download the BOR form. As you work on your branch leader list, selecting names to give them new jobs or add new names, the BOR will automatically be updated. You can continue to modify the information in the BOR until the deadline. Do not attempt to remove any names from the recent leader list, but please send any who have left. The BOR system can be used to print or save a branch leadership roster for the current year. **Note: You may experience difficulties if you are running a browser version more than three years old.**

Choose Your Branch

If prompted, choose your branch from the dropdown list and press Enter



Branch Officers Report bor.aauw-ca.org

Greetings, [redacted]

Welcome to the **Branch Officers Report (BOR)** system for AAUW California.

Choose your branch below to begin updating the list of officers for your branch. Have [redacted] on available. You will be able to:

1. Select individuals who have previously served as an officer.
2. Add new names as needed.

You can return to edit your branch officer list as many times as you need to, however **You will not be able to remove any names from the Leader List.** If you are aware [redacted] is deceased, 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:

Alameda
Alhambra-San Gabriel
Amador
Antelope Valley
Arcadia
Atascadero
Auburn

Enter

Update Branch Officer Listing Steps

You can assign an individual who has served as an officer in the past, add a new officer or view your list of officers

- 1** To see all the officers, click All NAMES
- 2** Select an existing officer from the list
- 3** Add a new leader to the list
- 4** Verify your report



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1 Recent Branch Leaders
show **less** all names (12)

Recent Branch Leaders

show less all names (12)

[List of names and positions]

Branch: Mariposa

2 Select a leader from the list to assign a position

3 Add New Leader

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 her contact information and assign position(s) for the next year.

OR

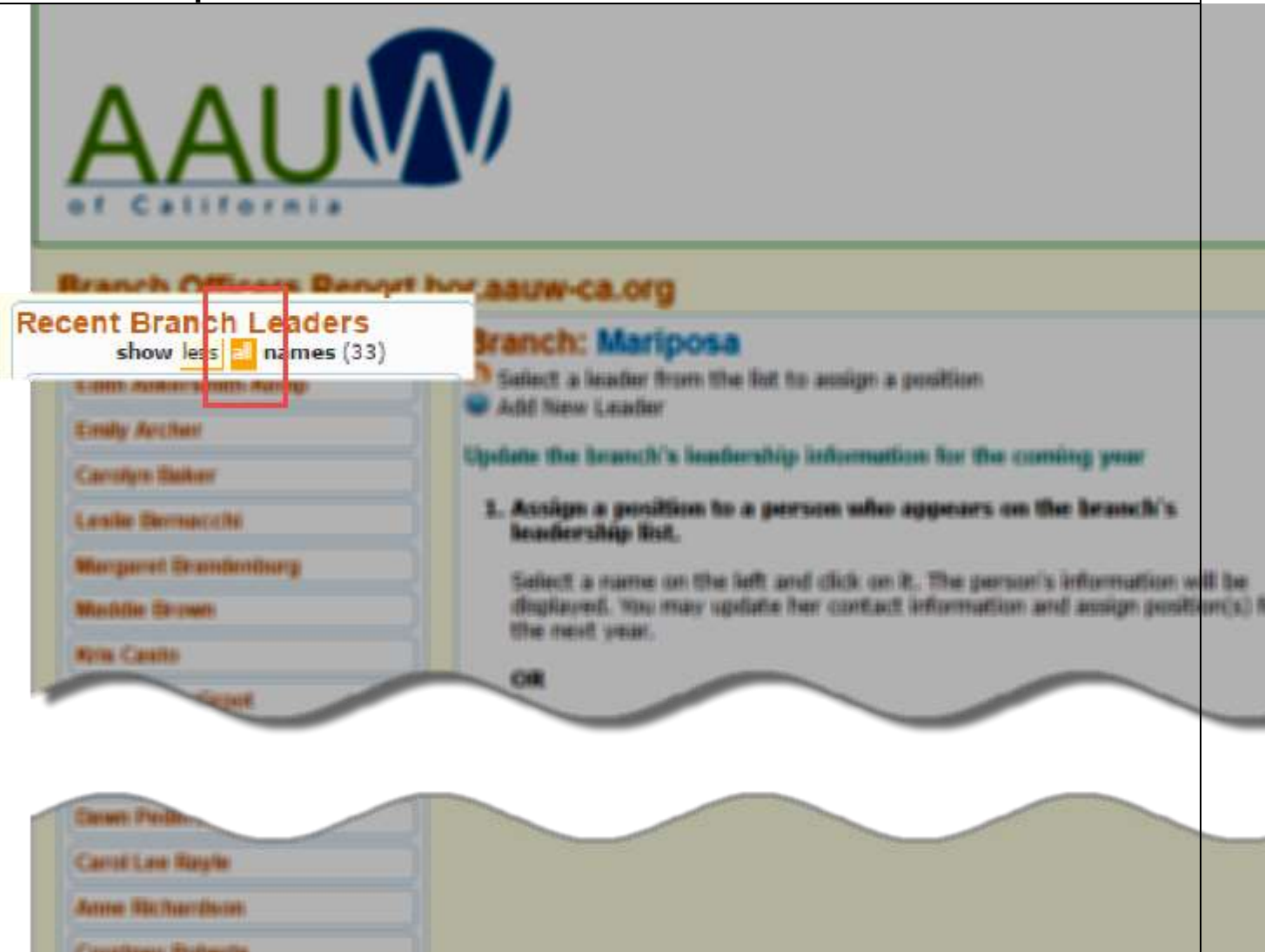
2. Assign a position to a person who does not appear on the branch's leadership list.

Click on Add New Leader. In the blank display add the person's contact information and assign position(s) for the next year.

4 Click here to verify your report for current or next year. You can print or save a copy

Expand the list of officers

Click on **ALL** to expand the list of officers so that you have access to the entire list of officers who have served in your branch since 2008.



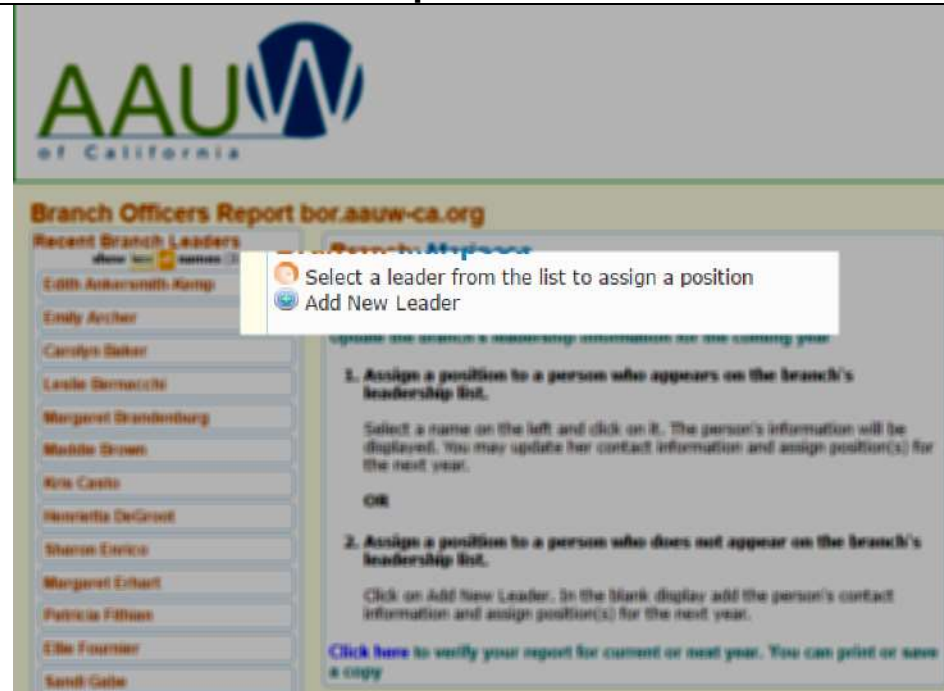
Choose how to update the records

If you see a leader listed at the left of your screen under Recent Branch Leaders:

Select a leader from the list to assign a position

If you do not see the individual:

Add a New Leader



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Recent Branch Leaders

show list names

- Edith Andersen-Kemp
- Emily Archer
- Carolyn Baker
- Leslie Bernhardt
- Margaret Brandenburg
- Middle Brown
- Kris Castle
- Marionette DeGroot
- Sharon Davis
- Margaret Eckhart
- Patricia Fithian
- Ellie Fournier
- Sarah Gale

Select a leader from the list to assign a position

Add New Leader

Update the branch's membership 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 her contact information and assign position(s) for the next year.
- 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.

[Click here to verify your report for current or next year. You can print or save a copy](#)

Use an Existing Record (Select a Leader)

- 1 Choose the leader from the list on the left
- 2 Their current position is listed
- 3 Choose their new positions(s). Note: we have added a new option – All Communication. Checking this box will allow the individual to receive any message sent from the State Board.
- 4 Update address information
- 5 Save the record by choosing **Update Information Now** when you are finished

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Recent Branch Leaders
show less names (33)

Branch: Mariposa

Select a leader from the list to assign a position
Add New Leader

Leaders Name

Current Position(s) (2017)
Web Manager

New Position(s) (2018)
(check/uncheck as needed)

- ☐ All Communication
- ☐ President
- ☐ President Elect
- ☐ Steering Committee
- ☐ Leadership Team
- ☐ Finance
- ☐ Secretary
- ☐ Membership
- ☐ Program
- ☐ Director
- ☐ Publicity
- ☐ Marketing

Contact information
All form fields are required.

Address:

City: Mariposa

State: CA

Zip: 95338

Phone:

Email: s

Update Information Now **Cancel**

Problems? Email us! office@aauw-ca.org

Choose the position that most closely matches your branch title. Please select the person from your branch who should receive communications that are normally directed to the position listed.

If you want to receive messages that are sent to multiple groups, check **ALL COMMUNICATION** in addition to the specific position for that person.

1

Enter contact information

2

Choose the position(s)

3

Save the record

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of California

Branch: Mariposa bor.aauw-ca.org

Add a New Leader's Contact Information

1

All form fields are required.

First Name:

Last Name:

Address:

City:

State:

Zip:

Phone:

Email:

Add Now

3

2

New Position(s) (2018)
(check/uncheck as needed)

☐ All Communication

☐ President

☐ President Elect

☐ Steering Committee

☐ Leadership Team

☐ Finance

☐ Secretary

☐ Membership

☐ Program

☐ Director

☐ Publicity

☐ Marketing

☐ Communication

☐ Web Manager

☐ Newsletter Editor

☐ International

☐ College University Coordinator

☐ Bylaws

☐ Public Policy

☐ Speech Trek Coordinator

☐ Tech Trek

☐ AAUW Fund

Updated 5/24/2017

8

Display or print a branch roster

Return to the main screen

Click on **Select a leader**

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Recent Branch Leaders
show first names (33)

Select a leader from the list to assign a position

Current Position(s) (2017)
Web Manager

New Position(s) (2018)
(check/uncheck as needed)

Contact information
All form fields are required.

Address:

City: Mariposa

State: CA

All Communication

President

Special Coordinator

Tech Trek

AAUW Fund (LAF)

AAUW Fund

Update Information Now Cancel

Problems? Email us! office@aauw-ca.org

Choose **Click here** to verify your report for the current or next year.



Branch Officers Report bor.aauw-ca.org

Recent Branch Leaders

show **less** all names (12)

Branch: Mariposa

- Select a leader from the list to assign a position
- Add New Leader

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.


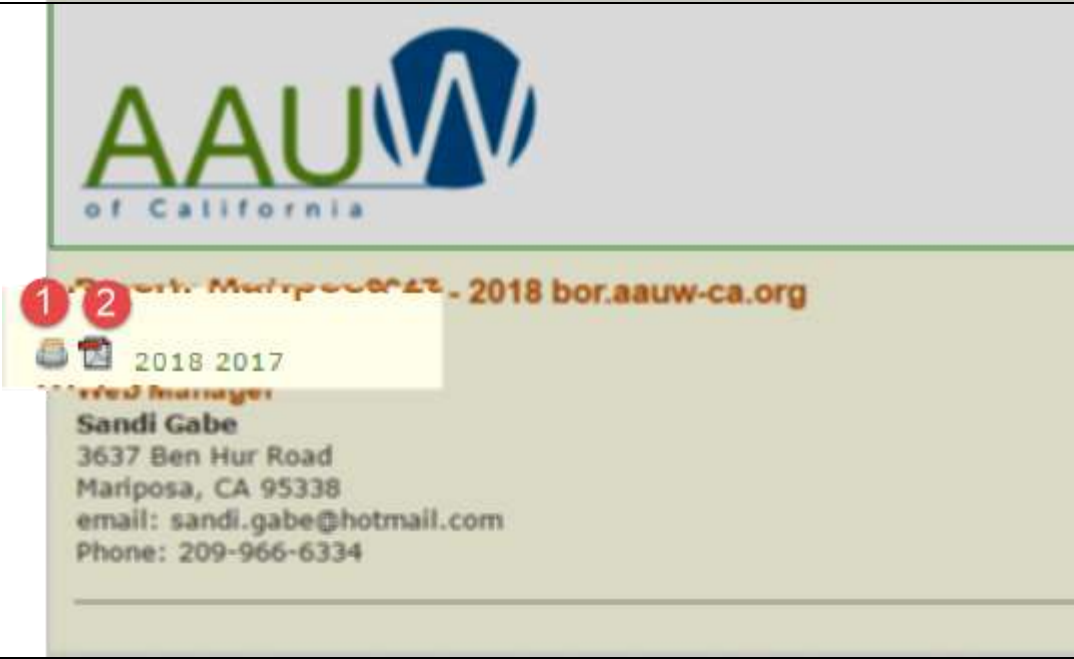
Select a name on the left and click on it. The person's information will be displayed. You may update her contact information and assign position(s) for the next year.

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.

Click here to verify your report for current or next year. You can print or save a copy

<p>Choose the year that you would like to see. 2018 = 2017-2018 fiscal year 2017 = current fiscal year</p>	
<p>1 Choose Print</p> <p>2 Choose PDF (you can also print this)</p>	

<p>What you'll see if you choose Print</p>	<div><div>Branch: Mariposa 2017 - 2018</div><div>Web Manager</div><div>Sandi Gabe 3637 Ben Hur Road Mariposa, CA 95338 email: sandi.gabe@hotmail.com Phone: 209-966-6334</div><div>back print page now</div><div>© 2017 AAUW California Online: www.aauw-ca.org Printed: Thursday May 18, 2017</div></div>
<div><div>What you'll see if you choose PDF</div><div><div>1</div>Download the file</div><div><div>2</div>Print the file</div></div>	<div><div>1 / 1</div><div><div>AAUW California Branch Roster</div><div>Branch: Mariposa - 2017 - 2018</div><div>Web Manager</div><div>Sandi Gabe 3637 Ben Hur Road Mariposa, CA 95338 email: sandi.gabe@hotmail.com Phone: 209-966-6334</div></div><div><div>1</div><div>2</div></div></div>

Answers to Frequently Asked Questions

What if I assign a job to a person in error?

Each person's information can be updated repeatedly. To "un-assign" a job for a leader:

1. Click on the member's name to open the entry.
2. Click on the checked position title to uncheck it
3. Then click on **Update Information Now.**
4. To verify, from the instruction page display, click on [Click here to...](#) view the positions assigned for the coming year.

How do I remove a 2016-2017 position from a person?

The BOR process is only concerned with positions for the incoming year, 2017-18. You cannot change the 2016-17 position assignments through this process.

How do I delete a person from the branch leadership list?

You cannot delete a person from the branch leadership list. The list includes all members who have held a leadership position in the branch since the 2008-09 year and they remain in our database. They will only be part of the branch's leadership roster if you assign them a position.

How do I correct the spelling of a name?

Once a person is in the AAUW CA database, the name cannot be changed through the BOR process. If a name is spelled incorrectly, please email the correct spelling and information to identify the erroneous record to office@aauw-ca.org. *You must include which Branch the leader is associated with to have her name corrected.*

What if a person shows on the branch leadership list multiple times?

If a person's name is listed multiple times in the branch leadership list, select one with the correct spelling of the name. Please make sure that ALL the contact information is correct when you complete the update. After the BOR deadline has passed, administrators will merge all the other records for the person into the one you have updated.

Our board has a position that is not listed. How do I tell you about it?

You may have more positions on your board than are shown on the list of positions to choose from. The list contains the positions with which AAUW CA most frequently communicates.

Our branch does not have anyone holding one of the positions you ask about. Should I leave the position unassigned?

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 office@aauw-ca.org.

Why does my branch roster not show all the positions?

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.

Someone else started to complete the BOR for my branch. Can I finish the job?

You certainly can. The BOR for a branch does not have to be completed by one person or all at one time.

How many times can I update the BOR?

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.

When is the BOR data transmitted to AAUW CA?

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.

I have a question that isn't answered here. How do I get an answer?

If your question is not answered by these instructions, please contact office@aauw-ca.org so this document can be updated. If you have the question, others probably do too.