



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:

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

The deadline for completing the AAUW CA BOR is July 1, 2018.

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.



Branch Officers Report (BOR) Branch Instructions & FAQ

Choose your Branch

If prompted,

1

Choose your branch from the dropdown list.

2

Press Enter



Branch Officers Report bor.aauw-ca.org

Greetings, Sandra



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. **Choose your branch below to begin updating the list of officers for your branch.**

1. Select individuals who have previously served as an officer.
 - o Remember to review and update their contact information.
 - o Start by clicking the "allnames" button before you begin. This will expand the list of Leaders.
 - o 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 updates is approaching.

You will not be able to remove any names from the Leader List. If you are aware of anyone who is not on the list, please contact the office at 916.448.7795 or email office@aauw-ca.org. 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 1
Amador
Antelope Valley
Atascadero
Auburn
Bakersfield

Enter

2



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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 that have served your branch in the last 8 years, click All NAMES.

2 To select an existing officer from the list, click on an officer name in the left column.

3 To add a new leader to the list, click ADD NEW LEADER

4 Verify your report



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Recent Branch Leaders
show **less** all names (16)

[Name]	[Position]

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](#)



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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

Branch Officers Report bor.aauw-ca.org

Recent Branch Leaders

- Edith Anderson-Kemp
- Emily Archer
- Carolyn Baker
- Leslie Bernhardt
- Margaret Brandenberg
- Madeline Brown
- Rita Castro
- Henrietta DeGroot
- Shana Collins
- Margaret Ebbert
- Patricia Filman
- CDe Freeman
- Sarah Gabe

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

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



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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 position(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. You may choose several positions.

4

Update address information

5

Save the record.



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Recent Branch Leaders
show less all names (16)

Leader's Name	Current Position(s) (2018)	New Position(s) (2019) (check/uncheck as needed)
Leader's Name	Secretary	<input type="checkbox"/> All Communication <input type="checkbox"/> President <input type="checkbox"/> President Elect <input type="checkbox"/> Finance <input type="checkbox"/> Secretary <input type="checkbox"/> Membership <input type="checkbox"/> Program <input type="checkbox"/> Communication <input type="checkbox"/> Newsletter Editor <input type="checkbox"/> International <input type="checkbox"/> College University Coordinator <input type="checkbox"/> Bylaws <input type="checkbox"/> Public Policy <input type="checkbox"/> Speech Trek Coordinator <input type="checkbox"/> Tech Trek <input type="checkbox"/> AAUW Fund

Branch: [Redacted]

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

Leader's Name: [Redacted]

Current Position(s) (2018): Secretary

New Position(s) (2019) (check/uncheck as needed):
 All Communication
 President
 President Elect
 Finance
 Secretary
 Membership
 Program
 Communication
 Newsletter Editor
 International
 College University Coordinator
 Bylaws
 Public Policy
 Speech Trek Coordinator
 Tech Trek
 AAUW Fund

Contact information
All form fields are required.

Address: [Redacted]

City: Mariposa
State: CA
Zip: 95338
Primary Phone: [Redacted]
Secondary Phone: [Redacted]
Email: [Redacted]

Update Information Now. Cancel

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

Add a New Leader



Branch Officers Report (BOR) Branch Instructions & FAQ

1

Enter contact information

2

Choose the position(s)

3

Save the record



Branch: Mariposa bor.aauw-ca.org

Add a New Leader's Contact Information

1

All * marked form fields are required

First Name:*

Last Name:*

Address:*

City:*

State:*

Zip*

Primary Phone:*

Secondary Phone:

Email:*

New Position(s) (2019)
(check/uncheck as needed)

- All Communication
- President
- President Elect
- Finance
- Secretary
- Membership
- Program
- Communication
- Newsletter Editor
- International
- College University Coordinator
- Bylaws
- Public Policy
- Speech Trek Coordinator
- Tech Trek
- AAUW Fund

2

Add Now

3



Branch Officers Report (BOR) Branch Instructions & FAQ

Display or print a branch roster

Return to the main screen by clicking on **Select a leader**

AAUW of California

Branch Officers Report bor.aauw-ca.org

Recent Branch Leaders
show names (33)

BRANCH: Mariposa

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

Special Coordinator

Tech Trek

AAUW Fund (LAF)

AAUW Fund

Update Information Now. Cancel

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



Branch Officers Report (BOR) Branch Instructions & FAQ

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



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Recent Branch Leaders

show all names (12)

[Redacted]

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](#)



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1

Choose the year that you would like to see.
2018 = 2017-2018 fiscal year
2019 = upcoming fiscal year

2

Print or download a pdf version of the document.



Branch: Mariposa 2017 - 2018 bor.aauw-ca.org

  2019 2018 **1**

All Communication

2

President

Secretary

Finance

Membership

Program



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<p>What you'll see if you choose Print</p>	<p>Branch: Mariposa 2017 - 2018</p> <hr/> <p>Web Manager</p> <p>Sandi Gabe 3637 Ben Hur Road Mariposa, CA 95338 email: sandi.gabe@hotmail.com Phone: 209-966-6334</p> <hr/> <p>back print page now</p> <p>© 2017 AAUW California Online: www.aauw-ca.org Printed: Thursday May 18, 2017</p>
<p>What you'll see if you choose PDF</p> <p> Download the file</p> <p> Print the file</p>	 <p>The screenshot shows a mobile device interface with a dark header bar containing '1 / 1' and navigation icons. The main content area displays the following text:</p> <p>AAUW California Branch Roster</p> <p>Branch: Mariposa - 2017 - 2018</p> <p>Web Manager</p> <p>Sandi Gabe 3637 Ben Hur Road Mariposa, CA 95338 email: sandi.gabe@hotmail.com Phone: 209-966-6334</p> <p>On the right side of the screenshot, there are two red circular icons labeled '1' and '2', corresponding to the instructions in the left column.</p>



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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 person from a previous position from a previous year?

The BOR process is only concerned with positions for the incoming year. You cannot change previous year history 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 the 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.



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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.