



# 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. 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

- 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.
- The spreadsheet is set up for a large branch (300 members).
  - You can hide the rows you don't need.
  - When first setting up your spreadsheet, you can add rows if you have more than 300 members. Add to all sheets before importing your branch members from the MSD.
- All cells that are not available for input have been locked for safety. The password is AAUWCA.
- Direct questions to [webteam@aauw-ca.org](mailto:webteam@aauw-ca.org).



# 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](http://AAUW.org).

IF YOU HAVE MORE THAN 300 MEMBERS STOP AND CONTACT [WEBTEAM@AAUW-CA.ORG](mailto: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 cell (A1). A red arrow points to the "Copy" button in the ribbon. A red circle with the number "1" is next to the text "SELECT ALL CELLS. Click here to highlight all cells. OR Click Ctrl/A to select all cells." A red circle with the number "2" is next to the text "COPY ALL CELLS. Right click on your mouse to bring up this window. Choose COPY, OR Click Ctrl/C." The spreadsheet data includes columns for Member ID, Member First Name, Last Name, Address, City, State, Zip, Phone, Email, Date, and Branch.

| Member ID | Member First Name | Last Name | Address | City      | State | Zip | Phone | Email | Date | Branch          |
|-----------|-------------------|-----------|---------|-----------|-------|-----|-------|-------|------|-----------------|
| 834331    | MOB-Bran          | Carolyn   | Bol     | 5765 Choi |       |     |       |       |      | CA0196-Mariposa |
| 5331188   | MOB-Bran          | Leslie    | Bol     | 5270 Mon  |       |     |       |       |      | CA0196-Mariposa |
| 4286705   | MOB-Bran          | Mindy     | Bol     | 4368 Brid |       |     |       |       |      | CA0196-Mariposa |
| 5290383   | MOB-Bran          | Angela    | Bol     | 4368 Brid |       |     |       |       |      | CA0196-Mariposa |
| 5360044   | MOB-Bran          | Angela    | Bol     | 4368 Brid |       |     |       |       |      | CA0196-Mariposa |
| 5274214   | MOB-Bran          | Angela    | Bol     | 4368 Brid |       |     |       |       |      | CA0196-Mariposa |
| 5346655   | MOB-Bran          | Angela    | Bol     | 4368 Brid |       |     |       |       |      | CA0196-Mariposa |
| 5339152   | MOB-Bran          | Angela    | Bol     | 4368 Brid |       |     |       |       |      | CA0196-Mariposa |
| 943387    | MOB-Bran          | Angela    | Bol     | 4368 Brid |       |     |       |       |      | CA0196-Mariposa |
| 1453265   | MOB-Bran          | Angela    | Bol     | 4368 Brid |       |     |       |       |      | CA0196-Mariposa |
| 5274213   | MOB-Bran          | Angela    | Bol     | 4368 Brid |       |     |       |       |      | CA0196-Mariposa |
| 5271176   | MOB-Bran          | Angela    | Bol     | 4368 Brid |       |     |       |       |      | CA0196-Mariposa |
| 5314626   | MOB-Bran          | Angela    | Bol     | 4368 Brid |       |     |       |       |      | CA0196-Mariposa |
| 5314625   | MOB-Bran          | Angela    | Bol     | 4368 Brid |       |     |       |       |      | CA0196-Mariposa |
| 2179885   | MOB-Bran          | Angela    | Bol     | 4368 Brid |       |     |       |       |      | CA0196-Mariposa |
| 5361752   | MOB-Bran          | Angela    | Bol     | 4368 Brid |       |     |       |       |      | CA0196-Mariposa |
| 5360043   | MOB-Bran          | Angela    | Bol     | 4368 Brid |       |     |       |       |      | CA0196-Mariposa |
| 3047510   | MOB-Bran          | Angela    | Bol     | 4368 Brid |       |     |       |       |      | CA0196-Mariposa |
| 807151    | MOB-Bran          | Angela    | Bol     | 4368 Brid |       |     |       |       |      | CA0196-Mariposa |
| 5330124   | MOB-Bran          | Angela    | Bol     | 4368 Brid |       |     |       |       |      | CA0196-Mariposa |
| 4460647   | MOB-Bran          | Angela    | Bol     | 4368 Brid |       |     |       |       |      | CA0196-Mariposa |
| 5328704   | MOB-Bran          | Angela    | Bol     | 4368 Brid |       |     |       |       |      | CA0196-Mariposa |
| 2379975   | MOB-Bran          | Angela    | Bol     | 4368 Brid |       |     |       |       |      | CA0196-Mariposa |
| 5091555   | MOB-Bran          | Angela    | Bol     | 4368 Brid |       |     |       |       |      | CA0196-Mariposa |
| 5346660   | MOB-Bran          | Angela    | Bol     | 4368 Brid |       |     |       |       |      | CA0196-Mariposa |
| 5075451   | MOB-Bran          | Angela    | Bol     | 4368 Brid |       |     |       |       |      | CA0196-Mariposa |
| 5291183   | MOB-Bran          | Angela    | Bol     | 4368 Brid |       |     |       |       |      | CA0196-Mariposa |
| 5361752   | MOB-Bran          | Angela    | Bol     | 4368 Brid |       |     |       |       |      | CA0196-Mariposa |
| 5107523   | MOB-Bran          | Angela    | Bol     | 4368 Brid |       |     |       |       |      | CA0196-Mariposa |
| 5214824   | MOB-Bran          | Angela    | Bol     | 4368 Brid |       |     |       |       |      | CA0196-Mariposa |
| 5356160   | MOB-Bran          | Angela    | Bol     | 4368 Brid |       |     |       |       |      | CA0196-Mariposa |
| 5198621   | MOB-Bran          | Angela    | Bol     | 4368 Brid |       |     |       |       |      | CA0196-Mariposa |
| 5201134   | MOB-Bran          | Angela    | Bol     | 4368 Brid |       |     |       |       |      | CA0196-Mariposa |
| 5328705   | MOB-Bran          | Angela    | Bol     | 4368 Brid |       |     |       |       |      | CA0196-Mariposa |
| 809450    | MOB-Bran          | Angela    | Bol     | 4368 Brid |       |     |       |       |      | CA0196-Mariposa |
| 5075454   | MOB-Bran          | Angela    | Bol     | 4368 Brid |       |     |       |       |      | CA0196-Mariposa |

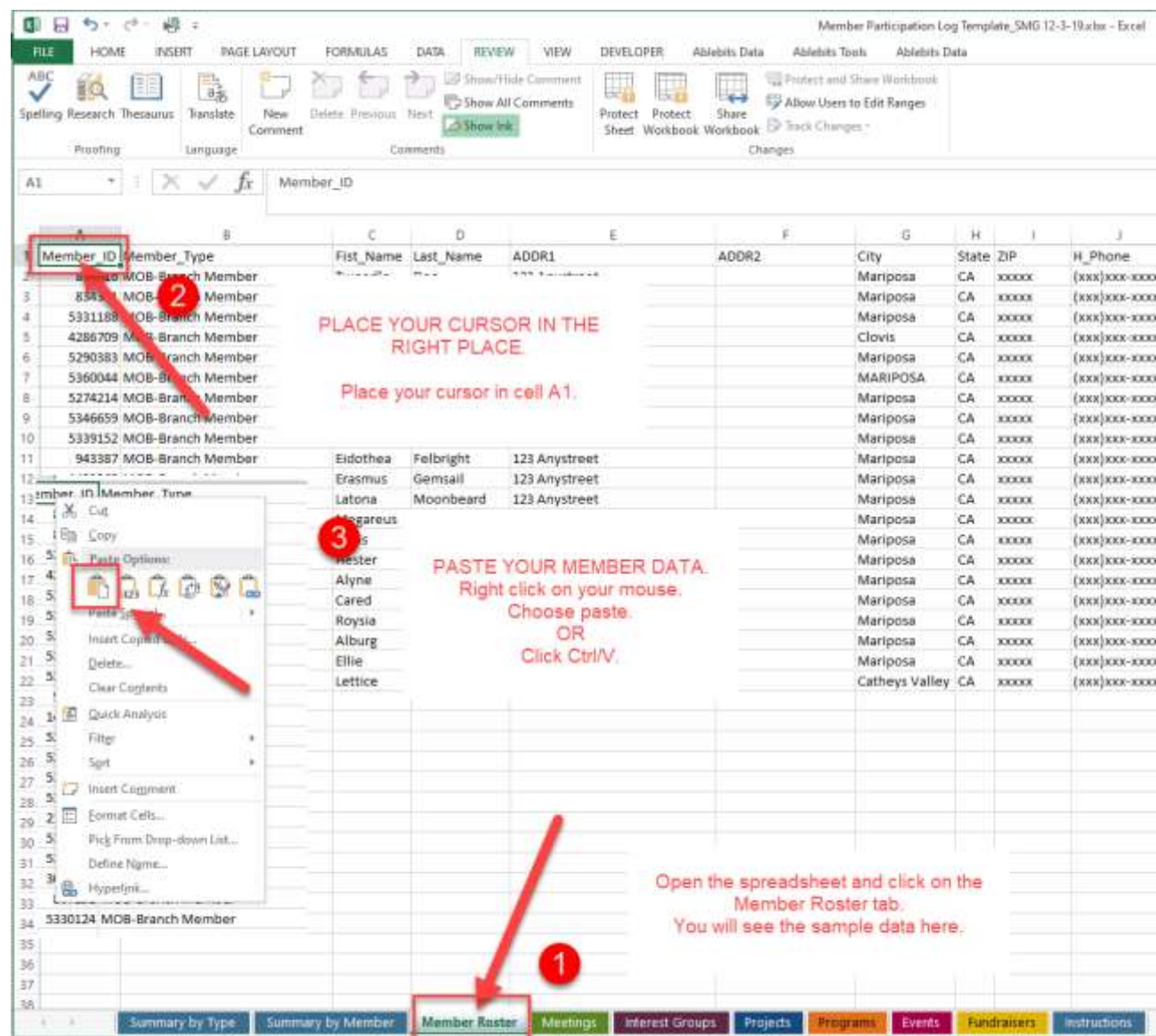
# AAUW California Member Participation Tracking Tool

## 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 the 'Member Roster' tab of the tracking tool. The interface includes a header with tabs for 'Summary by Type', 'Summary by Member', 'Member Roster', 'Meetings', 'Interest Groups', 'Projects', 'Programs', and 'Events'. The 'Member Roster' tab is active, displaying a table with columns for 'Member #', 'Last Name (From Member Roster tab)', 'First Name (From Member Roster tab)', and several 'Enter Event Name' and 'Enter Event Date' columns. Red arrows and numbered circles (1, 2, 3) provide instructions: (1) points to the 'Member Roster' tab, stating 'This information comes from the Member Roster tab. You can't change it here.'; (2) points to the event entry columns, stating 'You can enter event names and dates here'; (3) points to the participation cells, stating 'Enter a 1 in any cell if the member participated in the event.' A yellow tooltip explains: 'Enter a 1 in this field if the member participated. Leave blank or enter a 0 if they did not participate.' The table lists members such as Dee Tweedle, Tallhart Wynfreede, Catlin Guston, Coopercarol Bryde, Kropfang Celestine, Kuecrippler Ismay, Harpborn Sighard, Spiritsoul Bakis, Swiftgus Hester, Foxvipery Alyne, Smilestinger Cared, Tigertraveler Roysia, Redrazor Alburg, Siegefingery Ellie, and Quickson Lettice. The bottom of the table shows participation counts (0 or 1) for each member across various event categories.





# 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](mailto: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-*





## AAUW California Member Participation Tracking Tool Instructions

**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.*

| R                                | S                                | T                |
|----------------------------------|----------------------------------|------------------|
| Enter Interest Group<br>Name #15 | Enter Interest Group<br>Name #16 | Total for Member |
|                                  |                                  | 0                |
|                                  |                                  | 0                |
|                                  |                                  | 0                |
|                                  |                                  | 0                |
|                                  |                                  | 0                |
|                                  |                                  | 0                |

Enter new columns  
here.

-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.**

Calibri 11

B I