MSU ALUMNI ASSOCIATION
ALUMNI CLUB BASELINE / DIRECTIONS FOR COMPLETION

STEP 1
Login in to the Club Admin Panel on the MSU Alumni Association website at http://alumni.msu.edu/get-together/club-admin.
(If you get a “Page 404 Error”, try https://alumni.msu.edu/alumniGroups/ClubAdmin/index.cfm)

If you’ve forgotten your username and/or password, please contact Barb Susa-Fineis at susab@msu.edu or 517-432-2211.

STEP 2
You will most likely be directed to the “Dashboard” tab and the page will look like:

![Dashboard Image]

... and you’ll get an overview of the information the MSUAA currently has for your club.
STEP 3
Click on the “Edit” button in each section to update and add information.
Note that the Contact and Address and Web/Social Media sections are combined.
STEP 4 – CONFIRM, UPDATE AND/OR ADD YOUR CLUB INFORMATION

***In all sections, items with a red asterisk are required.***

**BOARD MEMBERS SECTION**
The initial page is an overview of the board member information the MSUAA currently has for your club.

<table>
<thead>
<tr>
<th>NAME</th>
<th>POSITION</th>
<th>EMAIL</th>
<th>OPTIONS</th>
</tr>
</thead>
<tbody>
<tr>
<td>MSU Spartan</td>
<td>Vice Chair/President/Director</td>
<td><a href="mailto:boardmember@msu.edu">boardmember@msu.edu</a></td>
<td></td>
</tr>
<tr>
<td>MSU Spartan</td>
<td>Chair/President/Director</td>
<td><a href="mailto:msuspartan@msu.edu">msuspartan@msu.edu</a></td>
<td></td>
</tr>
</tbody>
</table>

**To delete a person who is no longer a board member:**
1. Click on the “X” icon.
2. A text box will appear that reads “Please provide explanation”. Enter an explanation (e.g., “no longer on board”, “moved”) and click on the “X” icon a second time.
3. A text box will appear that asks “Are you sure you want to delete this club person? This action cannot be undone”. Click the “OK” button to delete.
To edit board member information:
1. Click on the “Edit” icon.

2. On this page, you'll confirm, update and/or add the following for each board member:
   - Name
   - Contact information – phone, email, and mailing address
   - Position
   - Term dates

HELPFUL HINTS FOR COMPLETING THIS SECTION

“Donor ID” is assigned by MSU and does not need to be entered.

“Position” = If the board member holds a position that is not listed in the drop down, choose “General Member” e.g., if the board member is the Philanthropy Chair, they should be denoted as “General Member”.

“Email” = Preferred email address for the board member, not the club.

Address information should be the home mailing address for the board member, not the club.

All board members must have a “Term Start Date” and “Term End Date”.

3. Click on “Update Person” at the bottom of the page.
To add a new board member:

1. Click on the “New Board Member” button.

2. Add the following for each board member:
   - Name
   - Contact information - phone, email, and mailing address
   - Position
   - Term dates

HELPFUL HINTS FOR COMPLETING THIS SECTION

Refer to “Edit Board Member Information” helpful hints above.

3. Click on “Add Board Member” at the bottom of the page.

Once all board member information is up-to-date, use the back button/arrow in the browser to navigate back to the club overview page.
CONTACT AND ADDRESS AND WEB/SOCIAL MEDIA SECTIONS
This page is an overview of the club contact and social media information the MSUAA currently has for your club.

On this page you'll confirm, update and/or add the following:
- Official alumni club name
- Mailing address for the club
- Primary contact person for the club
- Website and social media links

HELPFUL HINTS FOR COMPLETING THIS SECTION

Use “Previous Club Names” to list all names the club has used/are using that you are aware of e.g., ABC Spartans, Spartans of ABC, etc.

“Primary Contact” = Primary contact person for club. Should be a board member.

“Email” = Club email address. This can be a general club email or a specific person – however the club prefers to be contacted.

Phone numbers should be those of the Primary Contact.

Social media information.

“MSU Gifts Scenario” is for clubs that have an online gift cart established through MSU University Development. The MSUAA will complete this.

“Club Location” details = mailing address for the club.
CONTACT AND ADDRESS AND WEB/SOCIAL MEDIA SECTIONS continued

4. Click on “Update Club” at the bottom of the page.

Once all contact, location and web/social media information is up-to-date, use the back button/arrow in the browser to navigate back to the club overview page.

EXTENDED PROFILE SECTION
This page is an overview of the information about leadership, fiscal, communications, engagement and philanthropy the MSUAA currently has for your club.

NOTE: Save each subsection as you go by clicking the “Submit” button at the bottom of each subsection. Do not click the “Submit All” button in the upper left corner or the bottom left corner of the section.
**Leadership Subsection**
In this subsection you’ll confirm, update and/or add the following:

- Board meeting and elections frequency
- A current copy of your club bylaws
- The year when your club bylaws were last reviewed

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**HELPFUL HINTS FOR COMPLETING THIS SECTION**

To upload your club bylaws, the document will have to be saved on the computer you’re using to complete the baseline. You can then browse your computer to upload the document.

The year when the club bylaws were last reviewed may not correspond to the year when they were last updated. A periodic review of bylaws is recommended and updates made if necessary. If you do not know the year of last review, please enter “20XX” in the space provided.
Fiscal Subsection
In this subsection you’ll confirm, update and/or add the following:
- Financial institution where the club’s account(s) is/are held
- Who’s authorized to sign on the club account(s)
- The clubs EIN/TIN
- Is the club a 501(c)3
- Does the club have liability insurance

HELPFUL HINTS FOR COMPLETING THIS SECTION

“Financial Institution” = Name of the financial institution where the club account(s) is/are held.
If your club does not have any financial accounts, enter “No Accounts”.

For “Type of Account(s)” check all the boxes that apply.
If your club does not have any financial accounts, check the “Other” box. In the “Other account type” box that appears, enter “No Accounts”.

If your club does not have a TIN or EIN, enter “No Number”.

If you indicate that the club is a 501(c)3, you will have to upload your 501(c)3 determination letter. The document will have to be saved on the computer you’re using to complete the baseline and you can then browse your computer to upload the document.
Communications Subsection
In this subsection you’ll confirm, update and/or add the following:
- If the club is using iModules. If not, what email communication system is the club using
- If the club is using nvite. If not, what event registration system is the alumni club using?

Engagement Subsection
In this subsection you’ll provide:
- List of alumni club activities from the past year – January 1 – December 31, 2016
- Alumni club successes and challenges from the past year – January 1 – December 31, 2016

HELPFUL HINTS FOR Completing THIS Section
Documents will have to be saved on the computer you’re using to complete the baseline and you can then browse your computer to upload the documents.
Philanthropy Subsection
In this subsection you’ll provide:

- Name(s) of all scholarship(s) and/or endowment(s) held by the club

**HELPFUL HINTS FOR COMPLETING THIS SECTION**

The information provided should be the official name(s) (or as close as you can remember it ☝️) of the scholarship(s) and/or endowment(s), held either by MSU on behalf of the club, or independently by the club.

Once all leadership, fiscal, communications, engagement and philanthropy information is up-to-date, use the back button/arrow in the browser to navigate back to the club overview page.

**STEP 5 – REVIEW ALL INFORMATION**
If you need to make any changes, click on the “Edit” button in each section to do so. If everything looks great... .

**STEP 6 – LOG OUT AND YOU’RE DONE**
The MSU Alumni Association will begin reviewing club baselines as they are received and we will contact you if we have any questions.

Thank you and Go Green!