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 https://alumni.msu.edu/get-together/club-admin/index.cfm
(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:

... and you’ll get an overview of the information the MSU Alumni Association currently has for your club.
STEP 3
There are six sections to confirm, update and/or add information:
1. Identification
2. Contact and Address
3. Board Members
4. Award Recipients
5. Web/Social Media
6. Extended Profile
Click on the “Edit” button in each section to confirm, update and/or add information.
Note that the Contact and Address and Web/Social Media sections are combined once you click on the “Edit” button.
STEP 4 – CONFIRM, UPDATE AND/OR ADD YOUR CLUB INFORMATION
***IN ALL SECTIONS, ITEMS WITH A RED ASTERISK ARE REQUIRED***

IDENTIFICATION SECTION
***JUST FOR 2018*** For several clubs, we need to confirm club “boundaries” – the counties that the club represents.

Why is this important? Any time your club requests a mailing and/or email list, the GEO Code determines what counties and ZIP codes are included in the data pull.

This is important and ensures that your club is communicating with alumni in your area, not alumni in another state 😊

Confirmation of club boundaries is requested if your GEO Code number is green in color and an underline/hand icon appears when you hover over the number.

Confirmation of club boundaries is not needed if your GEO Code number is black in color and no underline/hand icon appears when you hover over the number.
To confirm club boundaries:
1. Click on the GEO Code number.
2. A list of counties in the club boundaries will appear.
3. Use the “Yes”, “No”, and “I Don’t Know” radio buttons to indicate:
   - “Yes” = county is in club boundaries
   - “No” = county is not in club boundaries
   - “I don’t know” = you don’t know

HELPFUL HINTS FOR COMPLETING THIS SECTION

NOTE: In some instances, a county may be listed more than once. In those instances, you only have to answer once.

Use the text field to enter and questions or comments about the counties in the GEO Code.

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

NOTE: Answers in this section are not binding. The MSU Alumni Association will be reviewing all answers and comparing it with other university and national data sources in order to determine the final club boundaries.
BOARD MEMBERS SECTION
The initial page is an overview of the board members for your club. Review the information to ensure that it is accurate.

- ***NEW FOR 2018*** For all current board members, go into each active board member’s profile to confirm, update and/or add information so each profile is complete. A complete profile includes:
  - Position
  - First and last name
  - Preferred phone
  - Email
  - Term start and end dates
- Add any persons who have been elected or appointed to the board.
- Delete any persons who are no longer a board member.

![New Board Member Table]

**Why is this important?** Anyone who is listed as a board member can act on behalf of your alumni club, including requesting mailing and/or email lists. Board members receive the monthly Alumni Club Leaders Update and initiative specific information, e.g., Give Green Day, from the MSU Alumni Association.
To edit current 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:
   - Position
   - First and last name
   - Preferred phone
   - Email
   - Term start and end dates

Why is this important? The MSU Alumni Association utilizes this information to send specific communications, including the monthly Alumni Club Leaders Update and initiative specific information, e.g., Give Green Day, to board members. Board member information should be edited when any of the information changes, e.g., a new email address, term start and end dates if they have been elected or appointed to serve another term.

HELPFUL HINTS FOR COMPLETING THIS SECTION

“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”.

“Preferred Phone” = Preferred phone for the board member, not the club. Please use the following format: 111-222-3333.

“Email” = Preferred email 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:
   - Position
   - First and last name
   - Preferred phone
   - Email
   - Term start and end 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.
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 “Enter an explanation and hit the X button again to submit”. Enter an explanation (e.g., “no longer on board”, “moved”).
3. Click on the “X” icon a second time.

4. 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.

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 contact and web/social media information for your alumni club.

On this page you’ll confirm, update and/or add the following:
- Primary contact person for the club
- Email for the club
- Club location
- Website and social media links

HELPFUL HINTS FOR COMPLETING THIS SECTION

No need to enter the “Password”. NOTE: Do not change the “Password” without informing other board members who access the Club Admin Panel.

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. The drop down menu is populated with board members from the board members section above.

“Email” = Club email address. This should be the email address where general inquiries should be directed. It can be a general club email or a specific person’s email.

“Preferred Phone” should be that of the Primary Contact. Please use the following format: 111-222-3333.

If you choose to “Restrict Phone”, the Preferred Phone will not appear on your club’s profile in the “Club Locator” section.

Why is this important? This information populates your club’s profile in the “Club Locator” section of the MSU Alumni Association’s website. If information is not provided or incorrect, alumni are not able to connect with, or contact, your alumni club.

The MSU Alumni Association also uses this information when we send emails/communications on your club’s behalf to alumni in your area in advance of specific initiatives, e.g., Give Green Day, or when promoting a club event.

For Twitter, enter the URL, not the handle, e.g., @MSUalumniclub.

“MSU Gifts Scenario” is only for clubs that have an MSU-held scholarship(s). For these clubs, MSU University Development creates an online gift cart. The MSU Alumni Association will complete this.
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.
AWARD RECIPIENTS SECTION

***NEW FOR 2018*** This page is an overview of recipients of your alumni club award(s). Since this is a new section, we are only requesting award recipients from 2017 and 2018. If you club does not make awards, skip this section.

To add an award recipient:

1. Click on the "New Award Recipient" button.

2. Add the following for each award recipient:
   - First Name, Middle Initial and Last Name
   - Graduation Year
   - Award Name
   - Award Year

   **HELPFUL HINTS FOR COMPLETING THIS SECTION**

   We have a lot of names in our university database, so if you know the "Middle Initial" and/or "Graduation Year", this will help us greatly!

   If you do not know “Middle Initial”, please enter “N/A” in the space provided.

   If you do not know “Graduation Year”, please enter “N/A” in the space provided.

3. Click on “Add Award Recipient” at the bottom of the page.

Once all award recipients are added, use the back button/arrow in the browser to navigate back to the club overview page.

Why is this important? A number of alumni clubs make awards to local alumni. The MSU Alumni Association would like to further recognize these individuals in our social media, Spartan magazine, invite them to the Grand Awards and include them in the program, etc. but we can only do so if we know who these award recipients are.
EXTENDED PROFILE SECTION
This page is an overview of the information about leadership, fiscal, communications, engagement and philanthropy for your club.

NOTE: Save each subsection as you go by clicking the “Submit” button at the bottom of each subsection.

Why is this important? This information provides the MSU Alumni Association with an overview of your club, and indicates where resources may be needed, what technical support is necessary, and what training materials should be created.

And, as volunteers move in and out of your club, and MSU Alumni Association staff change, the information in this section is helpful during these transitions.
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

HELPFUL HINTS FOR COMPLETING THIS SECTION
If you uploaded the club bylaws previously and they have not been updated since then, you do not need to reload the document.

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

For instructions on how to upload a document, click on “Read Upload Instructions.”

NOTE: If the uploaded document does not appear as an icon next to the field, you may have to refresh your web browser first.

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.

If a document has been uploaded, there will be an icon next to the field. If you hover over the icon, the name of the document will appear.
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, and type(s) of account(s)
- 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 a document has been uploaded, there will be an icon next to the field. If you hover over the icon, the name of the document will appear.

If you indicate that the club is a 501(c)3, you will have to upload the 501(c)3 determination letter.

If you uploaded the 501(c)3 determination letter previously, you do not need to reload the document.

The document will have to be saved on the computer you’re using to complete the baseline.

For instructions on how to upload a document, click on “Read Upload Instructions.”

NOTE: If the uploaded document does not appear as an icon next to the field, you may have to refresh your web browser first.
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 Eventbrite. 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, 2017
- Alumni club successes and challenges from the past year – January 1 – December 31, 2017

HELPFUL HINTS FOR COMPLETING THIS SECTION
Only one file can be stored at a time in these fields. If you uploaded a document for last year’s baseline, we’ve saved this. So, when you upload a new document this year, it will automatically overwrite the old/existing one.

If a document has been uploaded, there will be an icon next to the field. If you hover over the icon, the name of the document will appear.

Documents will have to be saved on the computer you’re using to complete the baseline.

For instructions on how to upload a document, click on “Read Upload Instructions.”

NOTE: If the uploaded document does not appear as an icon next to the field, you may have to refresh your web browser first.
Philanthropy Subsection
In this subsection you'll provide:
• Name(s) of all club scholarship(s) and/or endowment(s). This includes:
  o Scholarship(s) and/or endowment(s) that are held by MSU (University Scholarships and Fellowships) on behalf of the club
  o Scholarship(s) and/or endowment(s) that are held by the independently club

HELPFUL HINTS FOR COMPLETING THIS SECTION

The information provided should be the name(s) of the scholarship(s) and/or endowment(s).

There may already be information in the field. If so, do not delete it.

If the club record includes a subsection titled “Allocations included in club giving scenario that do not need to be entered above”, any scholarship(s) and/or endowment(s) listed there do not need to be provided - these are MSU-held scholarship(s) and/or endowment(s) and we already have this information which is being used to populate your club’s online gift cart.

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 – PRINT OUT A CLUB OVERVIEW FOR YOUR CLUB RECORDS
1. Go back to the “Dashboard” tab if you’re not already there.
2. Click the “Print” button in the “Contact and Address” section.

3. This will generate a club overview that you can print.

STEP 7 – 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!