

# A Guide for Branch Finance Officers

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This guide is intended to provide a general overview on the submission of dues to AAUW Ohio and other member maintenance that may be needed. Information is included on when you submit dues and forms, to whom you submit the dues and forms, and how you can submit dues and forms.

- I. The Basics
  - a) Membership year
  - b) When to submit dues
  - c) Who to submit dues to
- II. How to submit dues
  - a) The MSD
  - b) The MPP
  - c) The ADR
- III. Membership Categories
- IV. Summary of Important Information
- V. Appendix

## **I. FIRST THINGS FIRST, THE BASICS:**

### **a. The Membership year**

- i. For AAUW branches, the fiscal year runs July 1 through June 30.
- ii. Dues collection for the next fiscal year begins March 16.
- ii. Example: We are currently in Fiscal Year 20. The fiscal year began on July 1, 2019 and will run through June 30, 2020. Membership processing for Fiscal Year 20, began on March 16, 2019. Any membership forms and dues submitted between March 16, 2019 and March 15, 2020 are counted toward Fiscal Year 20.

### **b. When do you submit dues?**

- i. You can submit dues whenever you like and as often as you like.
- ii. There is no requirement that you have to have all dues collected by a certain date. The only dates that matter are the fiscal year and STARZ award requirement, but you can submit your branch's dues at any time.
- iii. For example, assume we are in our dream world where all of your members timely pay their dues and renew their memberships or joined for Fiscal Year 20 at the meeting we arranged. It makes sense to just do one submission for everything.
- iv. Now, let's look at reality. Most of the branch members renew and submit their dues when requested, but you are still trying to track down some people and still working on that recruitment. You can submit your report and pay the dues you have. When the people you are waiting for finally give you their dues, you can submit that information separately at any time throughout the year using the additional dues remittance form (the ADR, see Appendix).

### **c. Who do I send state dues to?**

- i. The AAUW Ohio Finance Officer is responsible for collecting all branch forms and dues.
- ii. The current Finance Officer is Jana Patchen.
- iii. Any questions or reports and dues can be directed to Jana at the following contact information:

- 1. 205 Saint Pierre St., Worthington, OH 43085
- 2. [jpatchen@att.net](mailto:jpatchen@att.net) or [finance.aauwoh@gmail.com](mailto:finance.aauwoh@gmail.com)
- 3. phone: 614-846-3070 cell: 614-578-4505

## II. HOW DO I SUBMIT DUES?

There are three ways a branch can report membership and pay dues. National would prefer you pay state and national dues through the Membership Payment Program (MPP). To use the MPP as the branch finance officer, you would need to have a branch debit/credit card. We recommend using the process that works best for you and your branch. If you are the tech savvy individual who just loves doing everything online, then the MPP program is for you.

If you want to keep the paperwork limited but are not comfortable paying dues online, then the Member Services Database (MSD) program is your best choice.

If you want to perform the dues submission manually via paper, use the Additional Dues Remittance (ADR) form.

So, the three ways to submit dues are:

1. The MSD (Member Services Database)

The MSD allows you to manage your membership online. This resource lists members who are eligible for renewal and makes it easy for you to add new members or update your branch member records. Finance officers can:

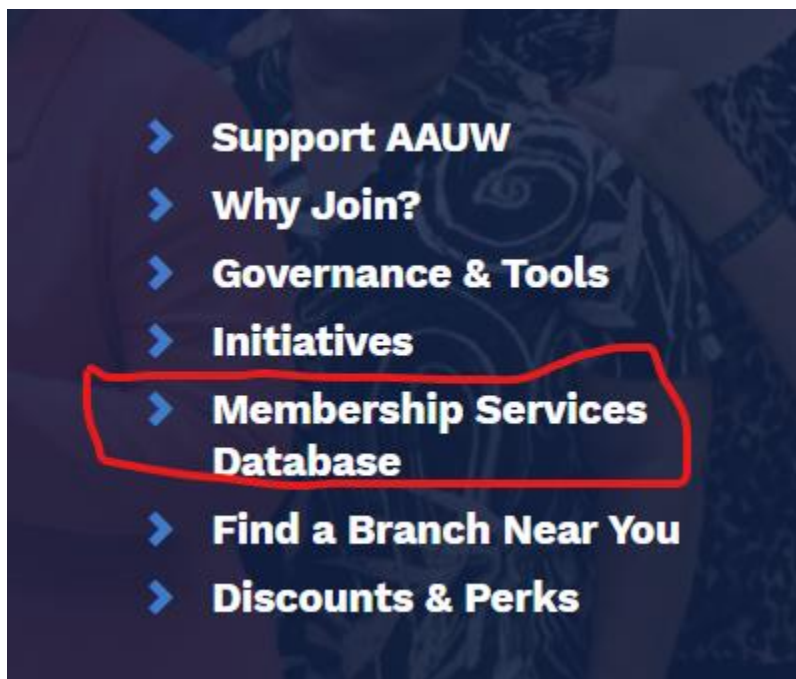
- a. Complete their dues report online.
- b. Print three (3) copies.
- c. Mail one payment to national with a copy of the dues report.
- d. Mail a second payment to state with a copy of the dues report.
- e. Keep the third copy for your records.

To access the MSD,

- a. Go to [aauw.org](http://aauw.org).
- b. Choose Membership at the top of the page.



- c. Choose Membership Services Database from the list that appears.



- d. Log in using your member ID and password.
- e. Choose to Enter the Member Services Database.

**Access Member Services Database**

Enter Member Services Database

Or

[Logout](#)

- f. From the left navigation bar, choose the Branch Dues Report Process.

My Profile / My Membership Card

Individual Contributions

State/Branch Logo

State Branch Profile (Status)  
Branch Status - OH4068  
State Status - OH

File IRS Form 990-N  
Branch File IRS Form 990-N  
State File IRS Form 990-N

College and University  
CU Partners and Reps Roster  
Student Affiliate Roster

Branch Member Contact Maintenance / Membership Cards

State & Branch officer listing

State/Branch Gift History  
Branch Contribution  
State Contribution

**Branch Dues Report Process**

Membership Payment Program (MPP)  
Branch MPP Opt-In Program  
State MPP Opt-In Program  
State MPP Dues Summary

Additional Dues Report Process

Branch Member Roster

Branch Contribution Report Form

- g. Your branch roster will appear. Click on the boxes for National and State membership as needed.
- h. Print the roster, and submit the paid members electronically. Remember: you need to print three copies.
- i. Mail one payment to national; mail a second payment to state, and keep the third for your records.

## 2. The MPP (Membership Payment Program)

The MPP is an enhanced feature within the MSD for those who prefer to combine dues payment processing, membership management, and tracking tools online. Members may pay directly using the MPP with a credit card, or the branch finance officer can complete a dues report and pay by credit card or a single check for the entire branch's payment. National, state and branch dues must all be paid together if you choose the MPP option. If this option has not been set up for use, it will need to be set up by the branch finance officer.

Follow steps (a) through (e) above to get to the Membership Services Database. Choose the Membership Payment Program (MPP) from the left navigation bar.

The screenshot shows a vertical navigation bar for the "empowering women" system. The bar contains the following menu items: "My Profile / My Membership Card", "Individual Contributions", "State/Branch Logo", "State Branch Profile (Status)" (with sub-items "Branch Status - OH4068" and "State Status - OH"), "File IRS Form 990-N" (with sub-items "Branch File IRS Form 990-N" and "State File IRS Form 990-N"), "College and University" (with sub-items "CU Partners and Reps Roster" and "Student Affiliate Roster"), "Branch Member Contact Maintenance / Membership Cards", "State & Branch officer listing", "State/Branch Gift History" (with sub-items "Branch Contribution" and "State Contribution"), "Branch Dues Report Process", "Membership Payment Program (MPP)" (highlighted in yellow, with sub-items "Branch MPP Opt-In Program", "State MPP Opt-In Program", and "State MPP Dues Summary"), "Additional Dues Report Process", "Branch Member Roster", and "Branch Contribution Report Form".

The branch finance officer can submit dues by debit/credit card for the branch; or members can submit their individual dues separately by credit card. State and branch dues will be paid directly into appropriate branch bank accounts once each month. You must Opt-in before you can pay in this manner.

### 3. The ADR (Additional Dues Remittance)

Use the Additional Dues Remittance (ADR) form to report and send any national or state dues collected for members, late renewals, lapsed members, and national members throughout the year.

To access the ADR, follow steps (a) through (e) above to reach the Membership Services Database. Choose the Additional Dues Report Process from the left navigation bar.

empowering women si

- My Profile / My Membership Card
- Individual Contributions
- State/Branch Logo
- State Branch Profile (Status)
  - Branch Status - OH4068
  - State Status - OH
- File IRS Form 990-N
  - Branch File IRS Form 990-N
  - State File IRS Form 990-N
- College and University
  - CU Partners and Reps Roster
  - Student Affiliate Roster
- Branch Member Contact Maintenance / Membership Cards
- State & Branch officer listing
- State/Branch Gift History
  - Branch Contribution
  - State Contribution
- Branch Dues Report Process
- Membership Payment Program (MPP)
  - Branch MPP Opt-In Program
  - State MPP Opt-In Program
  - State MPP Dues Summary
- Additional Dues Report Process**
- Branch Member Roster
- Branch Contribution Report Form

- Print the form and fill it out.
- Mail a copy of the form with one payment to national.
- Mail a copy of the form with a second payment to state.
- Keep a copy for your records.

### III. HOW TO CHANGE A MEMBER'S STATUS/DEMOGRAPHICS

To change a member's status/demographics (e.g., change of address, death, life member (MBL or MBHL), transferring or leaving the branch), go to the Member Services Database (MSD) using the same steps as shown above. Choose Branch Member Contact Maintenance from the left navigation bar.

Branch ID: OH4068-Zanesville

►► **Print Membership Cards** Preview/Print

To select your entire member list, click >>>


To select one or more, click the name inside the left box, then click >

Or hold the CTRL key on the keyboard and click each name to select them, then click >

Once selected, click PREVIEW/PRINT to view your selection then click PRINT.

To deselect names, click the name inside the right box, then click < or <<< for all.

Exp: 6/30/2018	Brooke Anderson	<div>&gt;&gt;&gt;</div> <div>&lt;&lt;&lt;</div> <div>&gt;</div> <div>&lt;</div>	
Exp: 6/30/2018	Danielle Barry		
Exp: 6/30/2018	Karen Brown		
Exp: 6/30/2018	Bette Christman		
Exp: 6/30/2018	Kelly Coffey		
Exp: 6/30/2018	Charlotte Cole		
Exp: 6/30/2018	Elaine Costanzo		
Exp: 6/30/2018	Mary Flanagan		
Exp: 6/30/2018	Barbara Hansen		
Exp: 6/30/2018	Helen Harper		
Exp: 6/30/2018	Marcia Hartman		
Exp: 6/30/2018	Susan Hasseler		

►► **Branch Member Contact Maintenance** 

Select the member from the dropdown menu, then click Go!

Choose a member ▼ Go!

At the bottom select the member and then click "Go!".



## Branch Member Contact Maintenance



Member ID/Name: 5321933 McCarty, Jennifer

Select the action you wish to report, then click Next

☐ Update Contact Information ☐ Remove From Branch\* ☐ Deceased

Cancel

Next

\*Use this feature to request the removal of paid life and honorary life members from your branch or anyone who must be removed prior to 11/30th, when all non-renewed members will automatically be dropped from the branch. Do not use this feature to report members who are transferring to another branch. The new branch will make the request.

Choose the appropriate action and click next. The screen may ask additional questions, such as how you became aware of someone passing. Respond as needed, such as “obituary.”

## IV. MEMBERSHIP CATEGORIES AND STATE DUES FOR EACH MEMBERSHIP CATEGORY

Ohio does not discount its dues for new members who join after January 1 or for any of the national initiatives such as “Shape the Future.” In Ohio, there are ten (10) different categories of membership:

a. A new member (NEW)

A new member is an individual who joins AAUW Ohio for the first time. This person’s state dues are **\$11.00**.

b. An annual branch member (MOB)

This is a standard member of a branch who renews each year. This person’s state dues are **\$11.00**.

c. A paid life member of a branch (MBL)

This is a member who is a life member of national. This person still pays state dues of **\$11.00**.

d. An honorary life-branch member (MBHL/MAHL)

This is a member who has been in AAUW for fifty plus years and who has verified this with national. **This person does not pay any state dues, but should be marked on your form if they are still living and a member of your branch.** If the member quit or is deceased, please go under Branch Maintenance and remove them.

e. A paying dual (DUAL)

This member is a member of another state who wants to also be a member of AAUW Ohio. This person pays \$11.00 in AAUW Ohio dues. Please write a note of explanation.

f. A non-paying dual (DUAL)

This member lives in Ohio and is a member of multiple branches. This person only pays Ohio dues with one branch, called her “primary branch.” If your branch is not the person’s primary branch, this person does not pay any state dues through the branch.

g. A transfer (T).

Transfers are similar to Duals in that some pay and some do not.

A member who, in mid fiscal year, transfers from another branch or who upgrades her membership from being only a national member is called a “transfer.”

If the person is upgrading from only a national member, they owe Ohio dues of \$11.00.

However, if the person was a paid member of another branch, as a courtesy, the member does not owe branch dues or Ohio dues for the remainder of the fiscal year, regardless of the state or branch to which the dues were paid. For example, a paid branch member from Indiana who moves to Ohio in mid-year does not owe Ohio dues until the following fiscal year. She is reported to the State Finance Officer as a “T” and is counted as a member of her new Ohio branch. Please write a note of explanation on why you mark an individual as a transfer and why they are or are not paying state dues. If you are confused as to how to treat this individual, please contact the State Finance Officer.

h. A paying transfer (formerly called MAL, now called T)

This is a national member who is joining Ohio. Their Ohio dues are \$0. They do pay branch dues.

i. A college university rep (REP)

This person is a faculty or staff member of a college or university partner member. The college or university chooses a representative and sends the name to the State Finance Officer with payment. The partner rep may vote at Ohio’s Annual Meeting

and enjoys full Ohio benefits, including mailings. This person does not pay any state dues. They may become a branch member by paying branch dues.

j. A student affiliate (SAF, ESAF, MOBG)

A student (undergraduate or degree seeking graduate student) whose college or university is an AAUW member does not pay national or state dues.

A student (undergraduate or degree seeking graduate student) whose college or university is NOT an AAUW member does pay national dues of **\$18.81**, but no state dues.

A list of member colleges and universities are shown in the MSD.

My Profile / My Membership Card

State/Branch Logo

State Branch Profile (Status)

Branch Status - OH4068

State Status - OH

File IRS Form 990-N

Branch File IRS Form 990-N

State File IRS Form 990-N

College and University

CU Partners and Reps Roster

Student Affiliate Roster






Branch Member Contact Maintenance / Membership Cards

State & Branch officer listing

**AAUW College / University Partner Member List**

AAUW College/University Partner Member and Representative in Ohio.  
\* Place your cursor over the C/U Rep name additional contact information.

Click [Here](#) to download the state College/University Partner Member of Representative List in a Spreadsheet.

CU Institution Name	Membership	CU Rep Name	City,State	Send Email
Bowling Green State University	Current-MAL	<a href="#">Houston, M. Sue</a>	Bowling Green, OH	
Case Western Reserve University	Current-MAL	<a href="#">Nielson, Lisa</a>	Cleveland, OH	
Case Western Reserve University	Current-MAL	<a href="#">Singer, Lynn</a>	Cleveland, OH	
College of Wooster	Current-MAL	<a href="#">Johnston, Angela</a>	Wooster, OH	
Columbus College of Art & Design	Current-MAL	<a href="#">Corn, Melanie</a>	Columbus, OH	

## V. SUMMARY OF IMPORTANT INFORMATION

- Who do I contact if I have a membership dues question?
  - Ohio Finance Officer: Jana Patchen. Contact information on page 2.
- Where do I send dues if I am using the paper forms and/or sending a check.
  - Jana Patchen, 205 Saint Pierre St., Worthington, OH 43085
- How much are state dues?
  - \$11.00 for new members, renewing members, a paid life branch member, a paying transfer, and a paying dual.
  - All other membership categories have no state dues but should be reported and marked as current. Deceased members, or members that have moved out of your area (or state) should be reported for accurate records.
- When do I send dues?

- a. You can send dues at any time as members join. However, to be considered for the Starz Award, dues must be submitted between March 16 and June 30.

5. National contact information

- a. If you need to contact national for a membership question, you can reach national customer service at [connect@aauw.org](mailto:connect@aauw.org) or call 800-326-2289.

**\*Purpose of the Starz Award**

- To increase communication between branches and between branches and the State Board.
- To help branch members become aware of their responsibilities to achieve the goals of AAUW.
- To acknowledge the efforts of branches in achieving these goals.

**Key dates to remember**

- Branch represented at AAUW Ohio Convention.
- Branch Officer List sent to Admin. Coordinator by July 1, 2019.
- Branch dues collected and sent to Admin. Coordinator and National Office by Sept. 15, 2019.
- Branch represented at Summit Conference August, 2019.

## APPENDIX

- a. The ADR Form
- b. Dues Chart



## ADDITIONAL DUES REMITTANCE (ADR) FORM – FY20

### FOR SUBMISSION OF NATIONAL AND STATE DUES

National dues payable to: AAUW - Mail to: AAUW Nat'l Dues, Box 96793, Washington, DC 20090-6793

State dues payable to: (Your State Name) AAUW - Mail to: AAUW (Your State Finance Officer)

[connect@aauw.org](mailto:connect@aauw.org) 800.326.2289, M-F, 10-5pm, ET 202.466.0892

#### YOUR CONTACT INFORMATION IS REQUIRED

BRANCH NAME/CODE:

FINANCE OFFICER's Name:

PHONE:

EMAIL:

#### INSTRUCTIONS

Use this form throughout the year to report and pay national and state dues for members of your branch for whom you have collected dues from before/after the annual Branch Dues Report (BDR) which is sent to branches who do not use online resources on or about May 1<sup>st</sup>.

Enter member name, contact details, and degree information (required for new members).

Use the National Dues Rates/Codes and Descriptions table to determine the national AMOUNT and the description CODE.

Add, total and enter the national dues. Add, total and enter the state dues. Make three copies of the ADR once completed.

Send a copy to AAUW National to the address at the top of the form. Send a copy to your state finance officer. Keep a copy for your records

National Dues Rates/Codes and Descriptions		
CODE	DESCRIPTION	FY20
NEW / RENEW	NEW OR RENEW – PAY YEARLY DUES	\$59
LIFE	PAID LIFE MEMBERSHIP - INDIVIDUALS WHO QUALIFY FOR NATL MEMBERSHIP MAY PAY TO BECOME EXEMPT FROM NATL DUES	\$1,180
MBL / MBHL	EXISTING PAID (MBL) / HONORARY LIFE (MBHL) MEMBERS ALREADY EXEMPT FROM NATIONAL DUES	\$0
SAF / MOBG	UNDERGRAD (SAF) / DEGREE SEEKING GRADUATES (MOBG) OF <u>NON-AAUW COLLEGE/UNIVERSITY MEMBER SCHOOLS</u>	\$18.81
ESAF / MOBG	UNDERGRAD (ESAF) / DEGREE SEEKING GRADUATES (MOBG) OF <u>AAUW COLLEGE/UNIVERSITY MEMBER SCHOOLS</u>	\$0.00
STF	<u>SHAPE THE FUTURE</u> 50% OFF NATL DUES FOR NEW OR LAPSED MEMBERS TWO YRS WHO JOIN AAUW AT A PUBLIC EVENT	\$29.50
GGG	<u>GIVE A GRAD A GIFT</u> – A RECENT GRADUATE MAY BE GIFTED ONE YEAR OF FREE MEMBERSHIP; MUST BE A NEW MEMBER	\$0
TRANSFER	TRANSFER MEMBER - TRANSFER FROM ANOTHER BRANCH OR NATL MEMBER STATUS; MUST BE PAID	\$0
CU REP	<u>COLLEGE/UNIVERSITY REPRESENTATIVE</u> - NAT'L DUES WAIVED THRU COLLEGE/UNIV MEMBERSHIP	\$0
DUAL	DUAL MEMBER - MEMBER OF MULTIPLE BRANCHES-ID# REQUIRED NAT'L DUES MUST BE PAID THRU PRIMARY BRANCH	\$0

PLEASE PRINT CLEARLY OR TYPE INTO THE FORM - PROVIDE COMPLETE NAME AND ADDRESS – REMIT PAYMENTS WITH FORMS

CODE and/ or ID #	NAME/ADDRESS	PHONE AND EMAIL	DEGREE, MM/YYYY GRADUATED and SCHOOL	National Dues	State Dues
GGG	(EXAMPLE) Jane Doe 1234 Nowhere St, City, State, ZIP	202/123-1234 janedoe@exampleonly.com	BS in Example, May 1979 University of Texas	\$59	\$
RECRUITER NAME / ID: Joanne Doe - 1234567					
RECRUITER NAME / ID:					
RECRUITER NAME / ID:					
RECRUITER NAME / ID:					
RECRUITER NAME / ID:					
RECRUITER NAME / ID:					
RECRUITER NAME / ID:					
Comments (Please enter only one recruiter's name and ID# above.)				\$ Ck#	\$ Ck#

PLEASE NOTE: If you have additional members, please make additional copies to suit your needs.

AAUW national membership dues are \$59, of which \$56 is tax deductible as a charitable contribution. The remaining \$3 is not tax deductible because it supports the AAUW Action Fund's section 501(c) (4) Capitol Hill Lobby Corps and get-out-the-vote activities. Student dues are \$18.81, of which \$16.81 is tax deductible and \$2 is not.

AAUW national life membership is \$1,180 and is fully tax deductible.

AAUW may share members' contact information with affiliated and like-minded organizations. To prevent the sharing, notify AAUW at 800/326-2289 or [connect@aauw.org](mailto:connect@aauw.org).

## B. Dues Chart (This chart is effective on March 16, 2019 for the fiscal year 2020.)

Member Category	AAUW Dues	Ohio Dues	Member Entitled to be a Convention Delegate or Hold Office
Annual Branch Member	\$59.00	\$11.00	Yes
Associate Member	\$15.00	\$11.00	No, generally only branch secretary
Paid Life Member (MBL)	\$0	\$11.00	Yes
Honorary Member (50 - year-MBHL)	\$0	\$0	Yes
Dual*	\$59 - Pays only once to National	\$11 – Pays only once if dual branches are in OH	Delegate only from primary branch (in which all three dues are paid)
Dual who lives outside Ohio	\$0	\$11	May be a delegate and hold office, see Bylaws, membership section
Student Affiliate (undergraduate and degree seeking graduate students) (C/U member+)	\$0	\$0	No
Student Affiliate (undergraduate and degree seeking graduate students) (non-C/U member)	\$18.81	\$0	No
Give a Grad a Gift	\$0	\$0	Yes
Shape the Future**	\$29.50	\$11	Yes
College/University Representative+	\$0	^see below	See AAUW Ohio Bylaws, Membership and Dues, Partner section
Satellites	Members of satellite branches or affiliate satellite pay dues according to their AAUW membership category.		

\*Dual members – Pay AAUW, state, and branch dues in one branch and only branch dues in any other branch they join. They are counted in the membership count from the branch where all three dues are paid. They may hold office in any branch where they are a member.

\*\*Shape the Future – when a new member signs up at an event, he/she pays half national dues, full state dues, and branch dues. For every 2 new Shape the Future members, the branch is allowed one free, with a maximum of three free members.

+ Each college/university member institution is entitled to a representative appointed by the college/university president (cost to college/university \$125 first year, \$175 thereafter). The representative must be member or a person that is eligible for membership; his or her national AAUW dues are waived. ^The representative **may** become a state or branch member upon payment of dues.