



Accessing Membership Records through the Chapter Reporting System

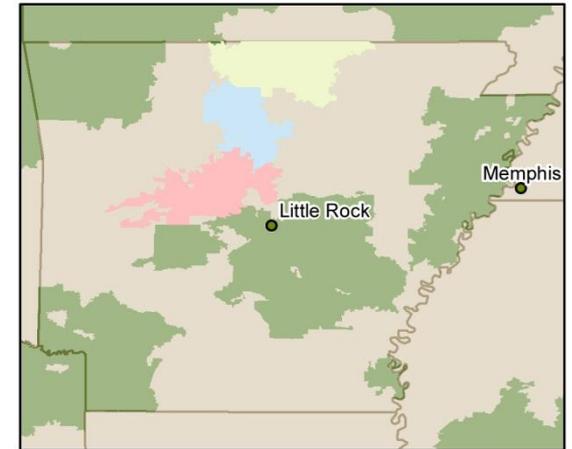
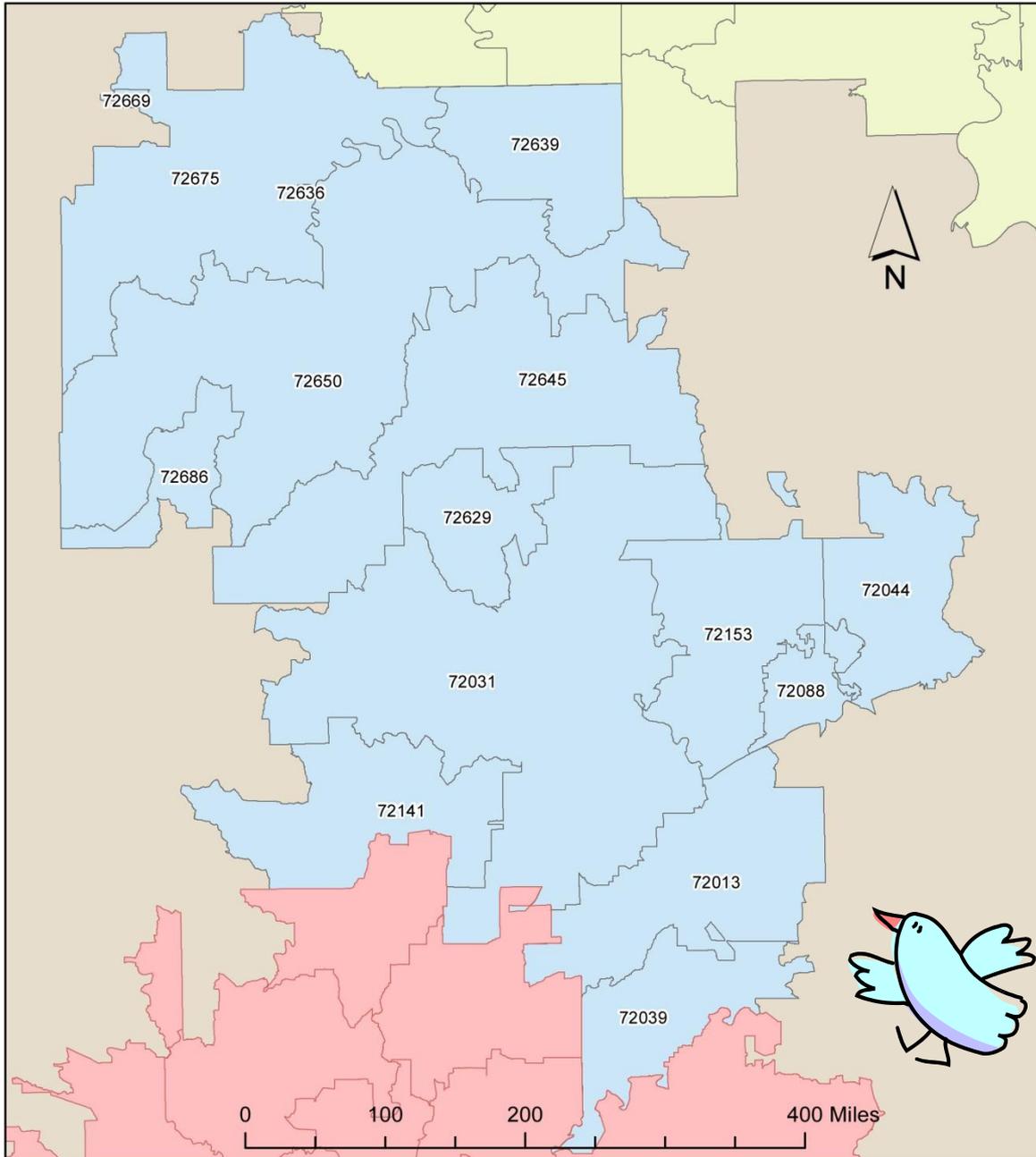
How are members assigned to Chapters?



The **Chapter territory** is a grouping of postal ZIP codes that are defined at the time of Chapter formation. The boundaries are determined so that members who live within them can easily attend meetings and take part in Chapter activities, and in general become part of a local Audubon community.



Little Red River Audubon Society and Bordering Chapters



- B54 Little Red River
- B60 North Central Arkansas
- B63 Arkansas River Valley
- Other Chapters

Created by Rebecca Sills, Audubon Chapter Services, 2/13/2012

Data Sources:
 Chapter data (12/31/2011) - Palm Coast Data
 State and City data - ArcGIS Online

How are members added to a Chapter's territory?

New members:

- Chapter-recruited
- NAS-recruited

Current members:

- Transfer into territory



What is the procedure for recruiting members?



What is the procedure for recruiting members?

In order for a Chapter to be paid for recruited members, the membership form must be coded properly and mailed to the correct address in Palm Coast, FL.

International: \$50

Full Name

Street Address

City

State/Province

Zip/Postal Code

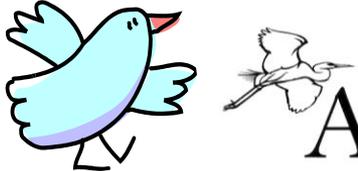
Country

E-mail address

Please Bill Me Payment Enclosed

Audubon magazine is published 6 times per year. Your gift to Audubon is tax deductible except for the amount allocated to Audubon magazine (\$750) for a one year membership. Please allow 6-8 weeks to receive your first issue.

If you have any questions about your membership please call: **1-800-274-4201.**



Audubon
www.joinaudubon.org

Official use only

Printed on recycled paper

2012 code:

C 2 Z _ _ _ 0 Z

last 2 digits will differ if incentive item is used

unique, 3-digit Chapter code

changes to reflect calendar year

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JOIN AUDUBON

First Name:

Last Name:

Street Address:

Street Address (2nd line):

City:

State:

Zip Code:

Country:

Phone: ex. 365-883-9992

Chapter Code: 

The chapter selected above will receive the full amount of membership paid for the first year of your membership. To renew a current membership, please click [here](#).

Introductory one-year membership cost:

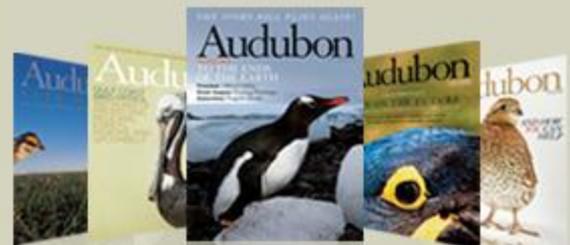
USA: 1 Year \$20

National Audubon Society

- Join Audubon
- Give a Gift Membership
- Sign up for Monthly Giving
- Donate to Audubon

MEMBERSHIP BENEFITS

Experience the World's Most Beautiful Magazine



Every issue of award-winning Audubon magazine features our signature blend of explanatory journalism and vibrant photography.

ENJOY THE MANY OTHER BENEFITS OF MEMBERSHIP:

Membership Incentive Items

Incentive Items

Audubon branded items are available for Chapters to use as incentives for membership recruitment. While there is a small cost to cover shipping, the items themselves are free of charge. Specific items offered will change periodically.

Alternatively, you may order these items to give away or use for other purposes. However, they are not intended for resale and they should not be used for Chapter-only membership recruitment or any other form of gift in exchange for a donation.

Details below explain how to order and use the Audubon Garden Tote as an incentive item. Please note that the recruitment code will differ for each incentive item offered. National Audubon Society will pay your Chapter 100% of the amount paid by each new member recruited. Payments will be directly deposited to the Chapter checking account at the beginning of each quarter, and the payment record will be posted to the [quarterly incentive payment report](#). Contact [Chapter Services](#) at (800) 542-2748 with any questions.

Audubon Garden Tote

Box of 12 for \$15.00

1. Use the Outreach Materials [order form](#) to place your order, or call or email your order to [Chapter Services](#), (800) 542-2748.
2. Offer each item as a free gift with a new membership.



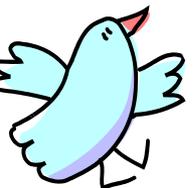
- [What is a Chapter?](#)
- [Find Your Local Chapter](#)
- [New Leader Orientation](#)
- [FAQs](#)
- + [Annual Reporting](#)
- [Reporting System Login](#)
- + [Chapter Networker](#)
- [Collaborative Funding](#)
- + [Conservation Programs & Projects](#)
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- + [Meetings & Events](#)
- + [Regional Directors and Elections](#)
- [Update Leader Contact Info](#)
- + [Contact Us](#)

Chapter Resources Handbook

- [About this Guide](#)
- [Starting a Chapter](#)
- ▶ [Running a Chapter](#)
- ▶ [Leader Roles & Resources](#)
- ▶ [Conservation Tools](#)
- ▶ [Education Resources](#)
- ▼ [Membership](#)
 - ▶ [Using the Chapter Reporting System](#)
 - ▼ [Recruitment](#)

What sorts of member outreach can Chapters do?

- Welcome letter to new members
- Chapter newsletter
- Calls to action
- Special appeals (e.g., Birdathon, annual appeal)
- Invitations to events
- Calls to volunteer
- Invitations to join Facebook page, follow Twitter or blog



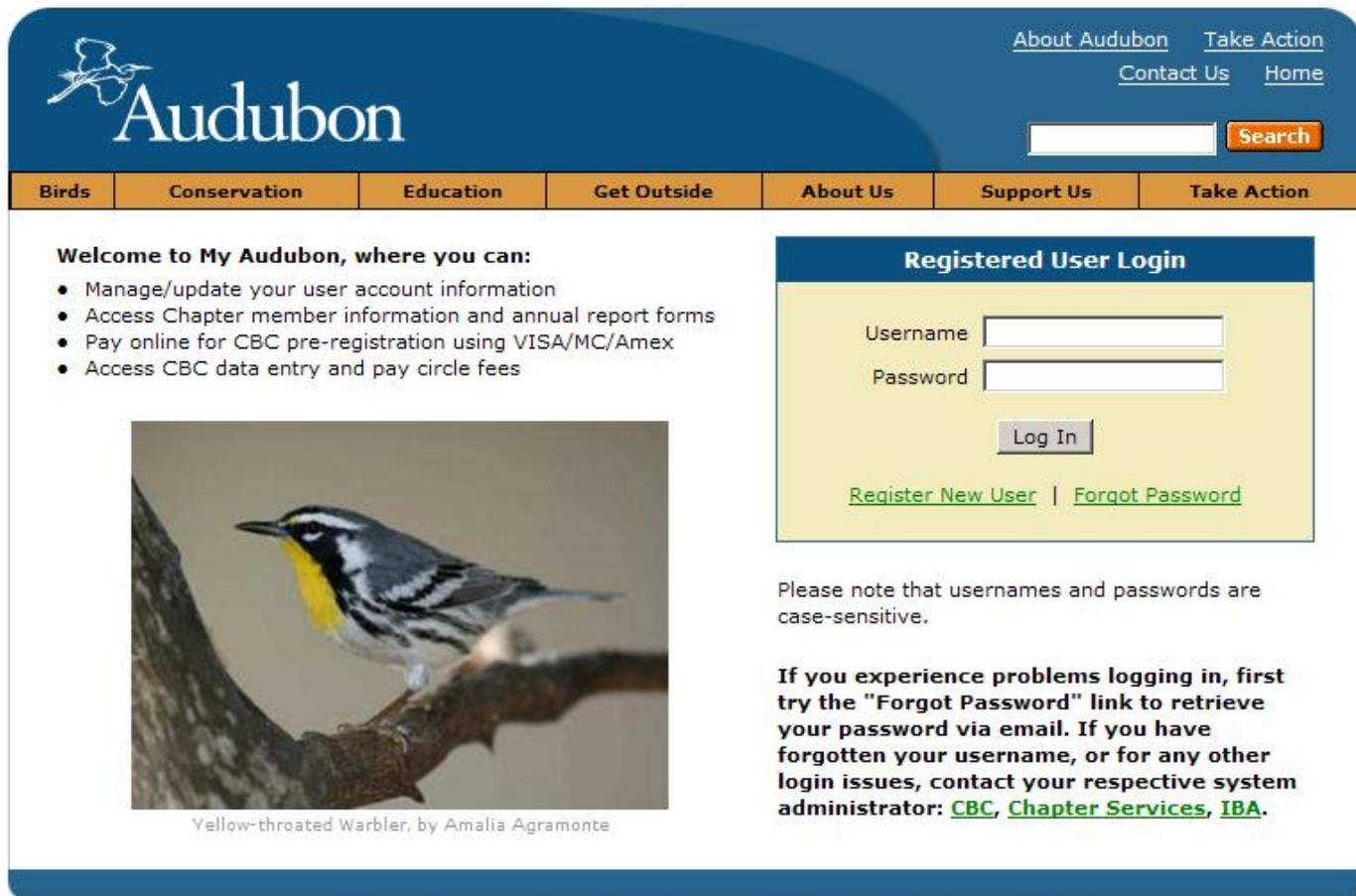
Are there restrictions on use of the membership list?



- Cannot share list with outside groups without NAS permission (conservation purpose generally o.k.; never for fundraising purposes)
- Be cautious of how the membership list is shared internally
 - President
 - Executive Director
 - Membership Chair
 - Treasurer
 - Newsletter Editor
 - Other leaders as deemed appropriate

Accessing membership lists, payments and labels through the Chapter Reporting System

<http://app.audubon.org/chapter/>



The screenshot shows the Audubon website interface. At the top left is the Audubon logo. To the right are navigation links: "About Audubon", "Take Action", "Contact Us", and "Home". Below these is a search bar with a "Search" button. A horizontal menu contains: "Birds", "Conservation", "Education", "Get Outside", "About Us", "Support Us", and "Take Action".

Welcome to My Audubon, where you can:

- Manage/update your user account information
- Access Chapter member information and annual report forms
- Pay online for CBC pre-registration using VISA/MC/Amex
- Access CBC data entry and pay circle fees

Registered User Login

Username

Password

[Register New User](#) | [Forgot Password](#)

Please note that usernames and passwords are case-sensitive.

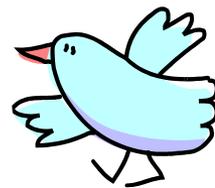
If you experience problems logging in, first try the "Forgot Password" link to retrieve your password via email. If you have forgotten your username, or for any other login issues, contact your respective system administrator: [CBC](#), [Chapter Services](#), [IBA](#).

Yellow-throated Warbler, by Amalia Agramonte



Step 1

Register for a My Audubon account



Accessing membership lists, payments and labels through the Chapter Reporting System



Step 2

Contact your Chapter or National Admin to notify him/her of your registration

Step 3

Your Chapter or National Admin will notify you when your registration has been activated

Chapter Reporting System – Home page

Audubon CHAPTER REPORTING

Help | Logout
My Account | My Projects

Chapter ID: J07

- Roster
- Payments
- Admin
- Member Lookup
- Annual Reports

Chapter Reporting

 **Kanza Audubon Society** **J07**

Roster:
Membership rosters, change reports and mailing labels

Payments:
Quarterly membership incentive payment reports

Admin:
Administrators can add and remove delegates and control their access to roster, payments and member lookup

Member Lookup:
Search for current members by ACS ID.

Annual Reports:
Access to enter current Chapter Annual Report Form or view archived reports

Depending on your level of permissions,
you may not have access to all pages shown.

Chapter Reporting System – Roster page



Audubon CHAPTER REPORTING

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Chapter ID: J07
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- Annual Reports

Chapter Roster



Kanza Audubon Society J07

Current

Roster	Change Report	Date Posted	Mailing Labels
J07-2011-09-30.csv	J07-2011-09-30 changes.csv	October 3, 2011	J07-2011-09-30.csv

Archives

Roster	Change Report	Date Posted
J07-2011-08-31.csv	J07-2011-08-31 changes.csv	Fri Sep 02 15:07:24 EDT 2011
J07-2011-07-31.csv	J07-2011-07-31 changes.csv	Mon Aug 01 10:06:05 EDT 2011
J07-2011-06-30.csv	J07-2011-06-30 changes.csv	Tue Jul 05 13:16:10 EDT 2011
J07-2011-05-31.csv	J07-2011-05-31 changes.csv	Wed Jun 01 11:38:30 EDT 2011
J07-2011-04-30.csv	J07-2011-04-30 changes.csv	Mon May 02 09:27:53 EDT 2011
J07-2011-03-31.csv	J07-2011-03-31 changes.csv	Thu Apr 07 15:17:00 EDT 2011
J07-2011-02-28.csv	J07-2011-02-28 changes.csv	Tue Mar 01 02:57:40 EST 2011
J07-2011-01-31.csv	J07-2011-01-31 changes.csv	Tue Feb 01 02:51:16 EST 2011
J07-2010-12-31.csv	J07-2010-12-31 changes.csv	Tue Jan 04 09:20:56 EST 2011
J07-2010-11-30.csv	J07-2010-11-30 changes.csv	Wed Dec 01 02:44:58 EST 2010
J07-2010-10-31.csv	J07-2010-10-31 changes.csv	Mon Nov 01 02:44:18 EDT 2010
J07-2010-09-30.csv	J07-2010-09-30 changes.csv	Fri Oct 01 02:38:08 EDT 2010
J07-2010-08-31.csv	J07-2010-08-31 changes.csv	Wed Sep 01 02:44:26 EDT 2010
J07-2010-07-31.csv	J07-2010-07-31 changes.csv	Sun Aug 01 03:23:16 EDT 2010
J07-2010-06-30.csv	J07-2010-06-30 changes.csv	Thu Jul 01 03:16:18 EDT 2010
J07-2010-05-31.csv	J07-2010-05-31 changes.csv	Tue Jun 01 03:19:00 EDT 2010
J07-2010-04-30.csv	J07-2010-04-30 changes.csv	Sat May 01 03:17:38 EDT 2010
J07-2010-03-31.csv	J07-2010-03-31 changes.csv	Thu Apr 01 03:19:22 EDT 2010
J07-2010-02-28.csv	J07-2010-02-28 changes.csv	Mon Mar 01 02:12:58 EST 2010



All files on this page updated monthly – by the 1st of the month.

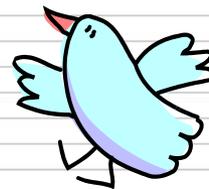
Show data current through the end of the previous month

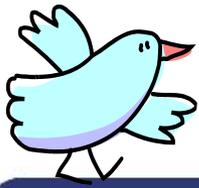
Rosters

- Current + 6 months expired members in the Chapter territory
- First row contains FIELD NAMES (column headers) – find key at <http://chapterservices.audubon.org/documents/key-roster-and-change-report-field-names>
- Data can quickly be sorted by field name

	A	B	C	D	E	F	G	H	I	J	K	
1	ACS ID	Millennium ID	Chapter	Full Name	Name Prefix	First Name	Middle Initial	Last Name	Name Suffix	Address1	Address2	Add
2	12563490	4280898	J07	Nancy Anderson		Nancy		Anderson		PO Box 213		
3	106344649		J07	Carolyn Miller		Carolyn		Miller		4524 E 249th St		
4	106444084		J07	Nancy Cruce		Nancy		Cruce		331 E 4th St		
5	19736697	4650500	J07	Suzanne Burkdoll		Suzanne		Burkdoll		PO Box 6		
6	106782598		J07	Dolores Robinson		Dolores		Robinson		401 NW Summit St		
7	101738639		J07	Jane Yocum		Jane		Yocum		30967 S California Rd		
8	103603650		J07	Harold Scheetz		Harold		Scheetz		828 Main St		
9	107048225		J07	Mary L. Sexton		Mary	L.	Sexton		520 Ellinwood St		
10	108429515		J07	Leroy Kness		Leroy		Kness		257 Lord St		
11	106651918		J07	M. E. Cochran		M.	E.	Cochran		520 S 4th St		
12	19205121	4304823	J07	Debbi Jackson		Debbi		Jackson		1012 Lincoln St		
13	106814837		J07	Virgal & Mildred Armstrong		Virgal & Mildred		Armstrong		314 S 12TH St		
14	20800278	5244784	J07	Linda Mollnow		Linda		Mollnow		1145 N 15th St		

	K	L	M	N	O	P	Q	R	S	T	U	V
1	Address2	Address3	City	State	Zip Code	Phone	Email	Start Date	Expired Date	Date Paid	Promotional Mail	Chapter Pref
2			Lyndon	KS	66451-0213			1/1/2005	6/30/2012	12/21/2010	Y	
3			Lyndon	KS	66451-9444			1/1/2011	12/31/2012	8/30/2011	Y	
4			Lyndon	KS	66451-9550			1/1/2011	12/31/2011	12/8/2010	Y	
5			Melvern	KS	66510-0006			9/1/2005	4/30/2014	8/9/2011	Y	
6			Melvern	KS	66510-9224			3/1/2011	2/29/2012	1/7/2011	Y	
7			Melvern	KS	66510-9315			3/1/2009	10/31/2013	1/24/2011	Y	
8			Osage City	KS	66523-1242			5/1/2010	4/30/2011	2/15/2010	Y	
9			Osage City	KS	66523-1330			3/1/2011	2/29/2012	1/28/2011	Y	
10			Osage City	KS	66523-1451			11/1/2011	10/31/2012	9/16/2011	Y	
11			Osage City	KS	66523-1502			1/1/2011	12/31/2011	12/23/2010	Y	
12			Osage City	KS	66523-1603	785-528-3589		7/1/2006	2/29/2012	1/29/2011	Y	
13			Osage City	KS	66523-1646			3/1/2011	4/30/2013	8/24/2011	Y	
14			Osage City	KS	66523-8502	785-528-4486		5/1/2008	12/31/2011	12/14/2010	Y	





Mailing labels



Audubon CHAPTER REPORTING

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- Roster
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Mailing Labels



Kanza Audubon Society J07

Select the label format you wish to create.

Enter a list of ACS IDs you wish to omit from the mailing labels list.

Layout:

2-Column 3-Column

Show "Or Current Resident" text:

Yes No

ACS IDs to Omit:

108429515
104022241
102949106
19205703
106576883
106651918

Enter one ID per line or separate using comma.
Leave blank to include all members on the label.

Create Labels

1. Select 2- or 3-column labels
2. Type/paste in any ACS IDs for members who have opted out of mailings
3. Click "Create Labels"

Mailing labels

Creates PDF labels

Remember to set scaling to “None” in Print dialog box

**Turn off 'Fit To Page' in
print dialog before printing.
Label Type: Av5160/8160
__Audubon Label Printing

ID:000106444084 Exp:12/11
NANCY CRUCE
OR CURRENT RESIDENT
331 E 4TH ST
LYNDON KS 66451-9550

ID:000101738639 Exp:10/13
JANE YOCUM
OR CURRENT RESIDENT
30967 S CALIFORNIA RD
MELVERN KS 66510-9315

ID:000019205121 Exp:02/12
DEBBI JACKSON
OR CURRENT RESIDENT
1012 LINCOLN ST
OSAGE CITY KS 66523-1603

ID:000017609090 Exp:10/12
STANLEY R. AUSEMUS

ID:000012563490 Exp:06/12
NANCY ANDERSON
OR CURRENT RESIDENT
PO BOX 100
LYNDON KS 66451-9550

ID:000106344649 Exp:12/12
CAROLYN MILLER
OR CURRENT RESIDENT
PO BOX 100
LYNDON KS 66451-9550

SUZANNE CRUCE
OR CURRENT RESIDENT
PO BOX 100
MELVERN KS 66510-9315

HARVEY YOCUM
OR CURRENT RESIDENT
828 S CALIFORNIA RD
OSAGE CITY KS 66523-1603

VIRGINIA JACKSON
OR CURRENT RESIDENT
314 S CALIFORNIA RD
OSAGE CITY KS 66523-1603

DORREEN WAECHTER
SALLY CONARD

Printer: HP Deskjet 6800 Series
Status: Ready
Type: HP Deskjet 6800 Series

Print Range:
 All
 Current view
 Current page
 Pages 1 - 3
Subset: All pages in range

Page Handling:
Copies: 1 Collate
Page Scaling: None
 Auto-Rotate
 Choose paper
 Use custom paper

Preview: Composite
Document: 8.5 x 11.0in
Paper: 8.5 x 11.0in
1/3

Buttons: Printing Tips, Advanced, Summarize Comments, OK, Cancel

Payments

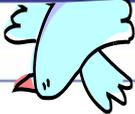
- Shows Chapter-recruited members and payments for each quarter
- Posted by the first of each month following quarter close

**Audubon** CHAPTER REPORTING Help | Logout
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Chapter ID: J07

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Chapter Payments

**Kanza Audubon Society** **J07**

Chapter Membership Recruitment Incentive Program

Quarterly Incentives Report	Date Posted
J07-2011-Q3 Incentives.csv	October 3, 2011

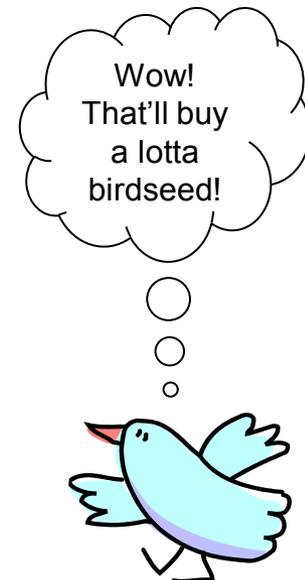
Archives	Date Posted
J07-2011-Q2 Incentives.csv	Fri Jul 29 10:51:56 EDT 2011
J07-2011-Q1 Incentives.csv	Wed Apr 13 11:14:36 EDT 2011
J07-2010-Q4 Incentives.csv	Tue Jan 04 15:51:36 EST 2011
J07-2010-Q3 Incentives.csv	Fri Oct 01 07:11:32 EDT 2010
J07-2010-Q2 Incentives.csv	Thu Jul 01 15:51:22 EDT 2010
J07-2010-Q1 Incentives.csv	Thu Apr 01 07:29:54 EDT 2010
J07-2009-Q4 Incentives.csv	Tue Jan 05 15:34:04 EST 2010
J07-2009-Q2 Incentives.csv	Tue Jan 05 14:37:06 EST 2010
J07-2009-Q3 Incentives.csv	Mon Nov 16 10:01:22 EST 2009
J07-2009-Q1 Incentives.csv	Thu Jul 16 12:51:58 EDT 2009

Payment report

- Chapter paid 100% of 1st-year member payment
- Directly deposited to Chapter checking account
- Field names defined at

<http://chapterservices.audubon.org/chapter-leader-guide/payments-page-membership-incentive-payment-reports>

4	Chp	Full Name	ACS #	Date Paid	Dollars
5					
6	Z22	LORI HARTSHORN	108115472	8/2/2011	20
7	Z22	STEVEN SVENDSEN	108115484	8/2/2011	20
8	Z22	MADISON JUDKINS CAMPO	108115496	8/2/2011	15
9	Z22	JAKE MYRE	108115508	8/2/2011	20
10	Z22	SHANNAN SEVERUD	108115510	8/2/2011	20
11	Z22	JODI KIFFMEYER	108115522	8/2/2011	100
12	Z22	CAREY WESTERBACK	108115534	8/2/2011	20
13	Z22	DEB KRAVIG	108115546	8/2/2011	20
14	Z22	LOREEN MORRELL	108115559	8/2/2011	5
15	Z22	CAROL L. WIDEN	108115561	8/2/2011	20
16	Z22	JOSH CARLISLE	108115573	8/2/2011	40
17	Z22	SANDT GIMPL	108115585	8/2/2011	20
18	Z22	KEN GAURKE	108115597	8/2/2011	20
19	Z22	KIMBERLY WHEELER	108518566	9/20/2011	20
20					
21	14				360



Chapter Administrator page

- One Admin per Chapter
- Can add/remove/adjust permissions for any number of users

Audubon CHAPTER REPORTING

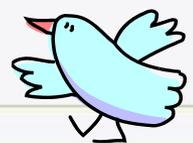
Help | Logout
My Account | My Projects

Chapter ID: J07

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- Admin
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- Annual Reports

Chapter Admin

 **Kanza Audubon Society** **J07**

Chapter Leader: Becca Sills (becca) 

Chapter Delegates	Roster	Payments	Member Lookup	Annual Reports
No delegates currently assigned				

Cancel Add Save

Search user database



Audubon CHAPTER REPORTING

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Chapter ID: J07

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- Annual Reports



User Lookup

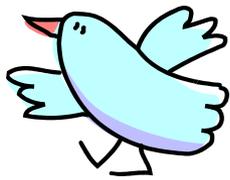
 Kanza Audubon Society J07

Enter a first and/or last name to search the list of already registered users. If the individual has not yet registered, you will be able to create a new user account.

First Last

Select	Name	Address	Username
<input type="radio"/>	Garry George	926 S. Citrus Ave Los Angeles, CA 90036	garrygeorge@pacbell.net

Didn't find the right person? You can create a new user.



Delegate added

- Adjust permissions by checking/unchecking checkboxes & save
- Remove user by unchecking all & save

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Chapter Admin

 **Kanza Audubon Society** J07

The following changes have been saved successfully:
The user has been added as a delegate.

Chapter Leader: Becca Sills (becca)

Chapter Delegates	Roster	Payments	Member Lookup	Annual Reports
Garry George (garrygeorge@pacbell.net)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

You can grant access to your chapter data by assigning users as chapter delegates.

▲ To add permissions to a delegate, check the permissions you would like to

Member Lookup

DO NOT USE THE LOOKUP FEATURE ON THIS SITE



IT'S BUGGY!

The screenshot shows the Audubon Chapter Reporting website. The header is dark blue with the Audubon logo and the text 'Audubon CHAPTER REPORTING'. On the right side of the header, there are links for 'Help | Logout' and 'My Account | My Projects'. A left sidebar contains a menu with the following items: 'Chapter ID: J07', '- Roster', '- Payments', '- Admin', '- Member Lookup', and '- Annual Reports'. The 'Member Lookup' item is crossed out with a red line. The main content area is titled 'Chapter Reporting' and features a blue bird icon next to the text 'Kanza Audubon Society J07'. Below this, there is a list of menu items with descriptions:

- Roster:** Membership rosters, change reports and mailing labels
- Payments:** Quarterly membership incentive payment reports
- Admin:** Administrators can add and remove delegates and control their access to roster, payments and member lookup
- Member Lookup:** Search for current members by ACS ID.
- Annual Reports:** Access to enter current Chapter Annual Report Form or view archived reports

Member Lookup

Go to the “Member Center on Audubon.org

Logout | Audubon Magazine | Newsroom | Audubon Near You | Chapter Services | **Member Center** | Careers | Contact Us



FOLLOW US:   

 [BIRDS](#) | [CONSERVATION](#) | [EDUCATION](#) | [GET OUTSIDE](#) | [ABOUT US](#)

[SUPPORT US](#)

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 You are currently working on our Production server, any changes you make will be posted live.



Controlling Pests with Birds

Alex Popovkin/ Flickr Creative Commons

Birds provide valuable ecosystem services, defending crops from insects (Audubon Magazine.) [Read More](#)

YOUR GIFT MATCHED

RAISE YOUR VOICE FOR ARCTIC BIRDS

Help us put the chill on BIG OIL.



Double your impact.
Lift only.

[DONATE NOW](#)

[Find Audubon Near You](#)

Member Lookup

Option A) Email Address:

Zip Code:

Option B) Membership #: [Where do I find this?](#)

Zip Code:

Option C) First Name:

Last Name:

Street Address:

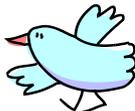
Street Address (2nd line):

City:

State:

Zip Code:

Country:



Enter info in either
Option A, B, or C and
submit the form

Member Lookup

To update your profile, [click here](#).

Personal Information:

Email Address: Please provide your email address, click [here](#)

First Name: LILLIAN

Last Name: DOVE

Street Address: 23 VIRGINIA DR

Street Address (2nd line): City:

State: MT

Zip Code: 59803-1233



Results of search

Local Audubon Chapter: [Click here to find your local chapter online](#)

Membership Information:

Member Number: 000106324484

Magazine Expiration Date: 09/01/2014

Last Membership Payment Date: 04/18/2012

of 2012 Gift Memberships: 0

Balance Due: \$0.00

[Click here to print your Membership Card](#)

Reporting Corrections to Records

For any notifications or questions about specific records, including:

- Address or other contact info updates
- Duplicate records
- Deceased members
- Change Chapter affiliation requests
- Remove from mailing list requests

Contact Membership Customer Service:

(800)274-4201 or audubon@emailcustomerservice.com

Include:

- ACS ID
- First & Last Name
- Old and new/corrected information

We're here for you!



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