AFFILIATE VIRTUAL SESSION SERIES

2020 VIRTUAL PLANNING SERIES

04 Affiliate Management with the ACE Database

SEPTEMBER 10, 2020
WELCOME AFFILIATES

• All attendees are in listen only mode for the presentation.

• This webinar is being recorded.

• We will do our best to answer your questions. We will compile the questions and will develop a FAQ document.

• Reach out to your RD with any additional questions or concerns.

• THANK YOU!

#acementorprogram
# Affiliate Management with the ACE Database

<table>
<thead>
<tr>
<th>Topic</th>
<th>Presenter</th>
</tr>
</thead>
<tbody>
<tr>
<td>WELCOME</td>
<td>MONICA WORHEIDE</td>
</tr>
<tr>
<td>INTRO</td>
<td>DIANA EIDENSHINK</td>
</tr>
<tr>
<td>AFFILIATE PAGES &amp; COMPLIANCE</td>
<td>ANDREW FRANKEL</td>
</tr>
<tr>
<td>AFFILIATE ADMIN BEST PRACTICES</td>
<td>RON ZUCCARO, ACE SF BAY AREA</td>
</tr>
<tr>
<td>CONSENT FORMS &amp; BACKGROUND CHECKS</td>
<td>KARI SMITH HAIT, ACE PORTLAND (OR)</td>
</tr>
<tr>
<td>Q&amp;A</td>
<td>PAULETTE DALLAS</td>
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</table>
OVERVIEW

- Admin Guide
  - Importance of database admin

- Affiliate Page
  - New login Process
  - Sub-Regions and Description
  - New Compliance section

- Search & Export Features
Every ACE affiliate should have at least one person assigned to manage its database. These individuals are responsible for managing registrations, creating and assigning teams, administering background check invitations, uploading affiliate compliance documents and more. The affiliate database administrator serves a crucial role within the affiliate that touches all aspects of the ACE program. Therefore, it is important that your affiliate select an individual who can be trusted with sensitive student and mentor data and relied upon to manage the database with consistent vigilance.
COMPLIANCE

REMINDER

- **Mentors**: attends 2 or more meetings, background check required
- **Guest Speakers**: attends less than 2 meetings, no background check required
- **Returning mentors**: log in to existing mentor profile in database
- Use database **weekly report email** to help monitor expired background checks
DATABASE GUIDES

Student Registration Guide
Mentor/Volunteer Registration Guide
Team Leader Guide
Scholarship Management Guide
Use this guide to help you set up and manage one or more custom scholarships for your affiliate.

Database Admin Guide
Every affiliate needs at least one database administrator – someone who manages all aspects of the database for the affiliate. This comprehensive guide provides useful info and tips on managing the entire affiliate database.

To access Affiliate Resources, see the ACE Mentor Tools Website and go to the 'Affiliate Resources' drop-down tab. This site is a one-stop resource for everything you need to manage a successful ACE program.
Affiliate Database Administrator Guide

1. Intro
2. Gaining Admin Access to the Database
3. Student and Mentor Search
4. Student Registration Process
   a. Registration
   b. Consent Form
5. Mentor/Volunteer Registration
6. Managing Background Checks
   a. Sending Invitations
   b. Troubleshooting Invitations
   c. Re-Sending Invitations After Original Expires
7. Participant Statuses
8. User Management - Assigning Sub-Admin Access
9. Managing Affiliate Section
   a. Sub-Regions
   b. Affiliate Description
   c. Editing Affiliate Profile
   d. Compliance Documents (New features in 2020)
10. Managing Teams
    a. Creating Teams
    b. Assigning Team Members
    c. Assign Team Leaders
ONE LOGIN FOR EVERYTHING

Upper Right Corner:

Logged in as Mentor/volunteer: Lois Lane

Switch to: Affiliate Sub Admin - Full Permissions

Logout

Switch to Sub-Admin Profile

No more Affiliate Profile Login!
UPDATE AFFILIATE

AFFILIATE DETAIL

AFFILIATE NAME
Test Affiliate

PHONE
123-456-7890

EMAIL
testedaffiliate@mentor.com

ADDRESS

CITY

STATE / ZIPCODE

REGION

SUB REGIONS

DESCRIPTION

ATTENTION! DO NOT SELECT the TEST Affiliate unless you are a national tester! If you are a local person registering for your local ACE program, make sure you find the correct affiliate from the above list. This selection is for testing purposes only.

Add Another Contact

Update Affiliate
## COMPLIANCE DOCUMENTS

The following documents are required to be on file and current in order for your affiliate to be considered in good standing with ACE National. For more information on these documents and affiliate compliance in general, visit the Affiliate Compliance section of the ACE Mentor Tools website.

### SCHEDULED (RECURRING) COMPLIANCE DOCUMENTS

Documents under this group must be reviewed, updated, and filed annually (unless otherwise noted in the term column) with the appropriate government entity and/or with ACE National.

<table>
<thead>
<tr>
<th>CATEGORY</th>
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<th>ACTION</th>
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<td>1 Year(s)</td>
<td>Current</td>
<td>4</td>
<td>Latest Doc Manage</td>
</tr>
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<td>Annual 990/990N/990T</td>
<td>06-22-2020</td>
<td>1 Year(s)</td>
<td>Current</td>
<td>2</td>
<td>Latest Doc Manage</td>
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<td>State Filing</td>
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<td>Outstanding</td>
<td>1</td>
<td>Latest Doc Manage</td>
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<td>1 Year(s)</td>
<td>Outstanding</td>
<td>0</td>
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<td>1 Year(s)</td>
<td>Outstanding</td>
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<tr>
<td>By Law</td>
<td>N/A</td>
<td>3 Year(s)</td>
<td>Outstanding</td>
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# Organizational (Permanent) Compliance Documents

Documents under this group remain unchanged after initial legal registration with the appropriate government entity, or with ACE National.

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<td>BRN Confirmation Letter</td>
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<td>N/A</td>
<td>Outstanding</td>
<td>0</td>
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<td>Affiliate Agreement</td>
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<td>Current</td>
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<td>Latest Doc</td>
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<td>State Charitable Registration (if applicable)</td>
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<td>Outstanding</td>
<td>0</td>
<td>Manage</td>
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<td>501c3 Determination Letter – for the few entities not on the ACA group exemptions</td>
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## Other Relevant Documents

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<th>ACTION</th>
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<td>Current</td>
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Manage
BOARD OF DIRECTORS

Updated board list ensures national has current contacts for the affiliate.

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<tr>
<th>NAME</th>
<th>EMAIL</th>
<th>BOARD ROLE</th>
<th>COMPANY</th>
<th>START YEAR</th>
<th>STATUS</th>
<th>ACTIONS</th>
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No record found

Showing 0 to 0 of 0 entries.

DOCUMENT TITLE

UPLOAD FILE

Choose File: No file chosen

NOTES

ADD TO CURRENT LIST

Uploading contacts here will add them to the current list.

OVERWRITE CURRENT LIST

Alert: Uploading contacts here will overwrite all BOD contacts for your affiliate.

Download BOD Template

Download BOD List

Upload
EXPORT OPTIONS

EXPORT DATA

- SELECT ALL

PERSONAL INFO

- FIRST NAME
- LAST NAME
- NICK NAME
- PRIMARY EMAIL
- SECONDARY EMAIL
- PARENT NAME
- PARENT'S PHONE
- STUDENT'S PHONE
- ALTERNATE STUDENT PHONE
- DATE OF BIRTH
- GENDER
- ETHNIC ORIGIN
- ADDRESS 1
- ADDRESS 2
- CITY
- STATE/TERRITORY
- ZIP
- ADDED NOTES
- PARENT CONSENT FORM RECEIVED
- PROFILE CREATED ON
- MEDICAL CONDITION
- ALLERGIES
- EMERGENCY CONTACT

AFFILIATE AND EDUCATION

- PROGRAM
- INVESTIGATION STATUS
- PROGRAM STATUS
- REGIONS
- AFFILIATE
- SUB REGION
- HIGH SCHOOL NAME
- SCHOOL TYPE
- GPA
- YEAR IN SCHOOL
- EXTRACURRICULARS
- FRIENDS OR MENTORS TEAM
- TEAM REQUEST IN STUDENT PROFILE
- ASSIGNED TEAM
- IS ALUMNI
- SCHOLARSHIPS AWARDED
- SCHOLARSHIPS APPLIED
- PRIMARY INTEREST
- SECONDARY INTEREST
- DO YOU QUALIFY FOR FREE LUNCH?
- CONVENIENT DAYS
- PROGRAM REGISTERED ON

EXPORT
The San Francisco Bay Area Affiliate uses the Sub-Region feature of the database. One of the first things we do is to assign Students and Mentors/Volunteers to Sub-Regions.

We have a hierarchy of “who does what” at the Sub-Regional and Team Level as shown in the following slides.

Our Sub-Regions are essentially the 9 Bay Area counties. Team Compliance Coordinators assign all personnel to Sub-Regions.

Regional Council Leaders then assign Students and Mentors/Volunteers to Teams.

Regional Council Leaders and Team Leaders communicate/collaborate on the personnel needs of each Team.
AffiCompliance Officer Affiliate

Team Compliance Coordinators (TCC)

• Oversight of Affiliate Compliance Status
• Communicate red flags to TCC and RCL

• Oversight of Team Compliance Status
• Assign Students and Mentors/Volunteers to Sub-Regions
• Collaboration and oversight with RCLs
• Communicate & advise of red flags to Regional Council Leaders
• Oversight of Student applications and Consent form status
• Oversight of Mentor/Volunteer applications & BGC status
Team Leaders (TL)

- Monitor **Sub-Region compliance status**
- Assign Students and Mentors/Volunteers to teams
- Assign Team Leader(s) to teams
- Communicate & rectify **red flags to Team Leaders**

Regional Council Leaders (RCL)

- Monitor Mentor/Volunteer **applications & BGC status**
- Input Students and Mentors/Volunteers **attendance** every week
- **Maintain accurate status of** Students and Mentors/Volunteers – ‘active’, ‘inactive’, ‘declined’

Teams
### Search Student Records

**Search Keyword**
- Search by Name or Email

**Program Year**
- Program Year 2020-2021

**Sub Region**
- Peninsula/San Mateo County
- Oakland/Alameda County
- Marin County
- Sonoma County
- Napa County
- Solano County
- Contra Costa County
- Other

**User Profile Status**
- Select

**Assigned Team**
- Select Team

**Name of High School**

**Secondary Interest**
- Select

**Team Request in Student Profile**

**Scholarships**
- Awarded
- Applied For

**Registration Status**
- Select

**Gender**
- Select

**Year in School**
- Select

**City**

---

Career Directions for Students in Architecture, Construction and Engineering
SEARCH STUDENT RECORDS

SEARCH KEYWORD
Search by Name or Email

PROGRAM YEAR
Program Year 2020-2021

SUB REGION
Peninsula/San Mateo County

PROGRAM STATUS
Select

ETHNIC ORIGIN
Select

PRIMARY INTEREST
Select

ZIP CODE / POSTAL CODE

FRIENDS AND MENTOR'S TEAM REQUEST

USER PROFILE STATUS
Select

ASSIGNED TEAM
PEN1

REGISTRATION STATUS
Select

GENDER
Select

YEAR IN SCHOOL
Select

CITY

PARENT CONSENT FORMS
Received
Non Received

Career Directions for Students in Architecture, Construction and Engineering
<table>
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<tr>
<th>SEARCH KEYWORD</th>
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<td>Program Year 2020-2021</td>
</tr>
<tr>
<td>SUB REGION</td>
<td>Select Sub Region</td>
</tr>
<tr>
<td>PROGRAM STATUS</td>
<td>Select</td>
</tr>
<tr>
<td>ETHNIC ORIGIN</td>
<td>Select</td>
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<tr>
<td>PRIMARY INTEREST</td>
<td>Select</td>
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<tr>
<td>ZIP CODE/POSTAL CODE</td>
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</tr>
<tr>
<td>FRIENDS AND MENTOR'S TEAM REQUEST</td>
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</tr>
<tr>
<td>USER PROFILE STATUS</td>
<td>Select</td>
</tr>
<tr>
<td>ASSIGNED TEAM</td>
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<tr>
<td>NAME OF HIGH SCHOOL</td>
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<tr>
<td>SECONDARY INTEREST</td>
<td>Select</td>
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<tr>
<td>TEAM REQUEST IN STUDENT PROFILE</td>
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<tr>
<td>SCHOLARSHIPS</td>
<td>Awarded, Applied For</td>
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<tr>
<td>REGISTRATION STATUS</td>
<td>Select</td>
</tr>
<tr>
<td>GENDER</td>
<td>Select</td>
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<tr>
<td>YEAR IN SCHOOL</td>
<td>Select</td>
</tr>
<tr>
<td>CITY</td>
<td></td>
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Career Directions for Students in Architecture, Construction and Engineering
<table>
<thead>
<tr>
<th>NAME</th>
<th>CITY</th>
<th>SUB REGION</th>
<th>TEAM</th>
<th>PROGRAM YEAR</th>
<th>REGISTRATION STATUS</th>
<th>PROGRAM REGISTERED ON</th>
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<th>PARENT CONSENT FORM</th>
<th>ACTION</th>
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<td>Pending</td>
<td>No</td>
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<tr>
<td>Sara Li</td>
<td>San Francisco</td>
<td>San Francisco</td>
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<td>08-14-2020</td>
<td>Pending</td>
<td>No</td>
<td></td>
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<tr>
<td>Michelle Malagon-Cazarin</td>
<td>Santa Clara</td>
<td>San Jose/Santa Clara County</td>
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## TEAM LEADERS – REQUIRED ATTENDANCE

**PEN1 (INACTIVE)**

MENTORS: 10 | STUDENTS: 19

TBD

<table>
<thead>
<tr>
<th>NAME</th>
<th>CITY</th>
<th>SUB REGION</th>
<th>PROGRAM YEAR</th>
<th>REGISTRATION STATUS</th>
<th>PROGRAM REGISTERED ON</th>
<th>PROGRAM STATUS</th>
<th>BACKGROUND CHECK STATUS</th>
<th>BACKGROUND CHECK EXPIRATION</th>
<th>ACTION</th>
<th>VOLUNTEER ROLE (ENGAGEMENT TYPE)</th>
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<tbody>
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<td>Eligible</td>
<td>02-10-2023</td>
<td>Mentor</td>
<td>Team Leader</td>
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<tr>
<td>Cinthyia Mendez Ramirez</td>
<td>Fremont</td>
<td>Peninsula/San Mateo County</td>
<td>Program Year 2019-2020</td>
<td>Complete</td>
<td>01-02-2020</td>
<td>Completed</td>
<td>Eligible</td>
<td>03-03-2023</td>
<td>Mentor</td>
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<tr>
<td>Lisha Zhang</td>
<td>Radiation</td>
<td>Peninsula/San Mateo County</td>
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<td>01-06-2020</td>
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# TEAM LEADERS – REQUIRED ATTENDANCE

**PEN1 ATTENDANCE**

(Team member: 29)  (Student: 20)  (Mentor: 9)

Please note: Engagement Percentage calculates as follows:
- Present & Excused = Present
- Absent & NA = Absent

<table>
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<tr>
<th>MEMBER</th>
<th>%</th>
<th>INTRO AND OAC RELATIONSHIPS 01-14-2020 81 ENCINA AVENUE</th>
<th>STRUCTURAL ENGINEERING 01-21-2020 81 ENCINA AVENUE PALO ALTO</th>
<th>SUSTAINABILITY 01-28-2020 FACEBOOK, 1 HACKER WAY</th>
<th>HISTORICAL RENOVATIONS 02-04-2020 1213 NEWELL ROAD PALO ALTO</th>
<th>BIM AND MODELING 02-11-2020 81 ENCINA AVE, PALO ALTO</th>
<th>WATER QUALITY CONTROL PLANT TOUR 02-25-2020 2501 EMBARCADERO WAY, PALO ALTO</th>
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<tr>
<td>Anderson Wang</td>
<td>80%</td>
<td>P</td>
<td>P</td>
<td>E</td>
<td>P</td>
<td>E</td>
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<tr>
<td>Anika Logan</td>
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<td>Benedict Goh</td>
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<tr>
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<td>E</td>
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</tbody>
</table>

Career Directions for Students in Architecture, Construction and Engineering
Signed up for ACE!

Parent/Guardian/Student Consent Forms & Mentor Background Checks

Kari Smith Haight
Program Manager
ACE Mentor Program of Oregon
GOOD SAFETY PRACTICES

MENTORS

1. EVERY Mentor in a session must have an APPROVED status.

A Mentor is APPROVED if:
- Registered in the ACE database
- Has passed background check
- Completed online training
- Is cleared by school to volunteer (as applicable)

STUDENTS

1. EVERY Student in a session must have an APPROVED status.

A Student is APPROVED if:
- Registered in the ACE database
- Has a signed parent consent form on file
If you allow an UNapproved mentor or student to participate in a session, every mentor allowing this to happen may be personally liable for anything that may happen during that session.

Similarly, if an UNapproved adult engages in inappropriate behavior with a student, every mentor allowing this individual to participate in ACE could be personally liable.

ACE’S INSURANCE COVERS YOU AND THE PROGRAM ONLY FOR APPROVED MENTORS AND STUDENTS!

*Note: This is not intended to be legal advice.

Emergency Contact: Whom to call
• Required or they are not allowed to participate
• Required every year
• Publish “application” deadline

• Host live/virtual information sessions and help students through the registration process

• Accept various file formats (pictures, paper, etc.) of the consent form
• Sort/Export Student Data once a week starting month before application deadline (admin feature)
• Export sorted list in database
• Export Student Data once a week starting month before application deadline (staff or designated volunteer)
• Send follow up emails (Gmail merge)

• Emails – Clear and Simple
  • No more than 3 steps to a process
  • Clear information – Telling subject Line, what, how and by when, and who
  • Attach copy of the form

• Emails sent to:
  • Student primary and secondary emails
  • Parents email
  • School contacts
ACE Mentor Program - deadline tomorrow to complete app!

<<First Name>>:

Thank you for your interest in the program!

You’ve started an application for the ACE Mentor Program, but it still needs some attention before the **5pm deadline tomorrow, Friday, Nov. 22.**

Please complete the following parts:

1. Create an ACE student account - create a student account (select the purple "New student" button at the bottom of the page).  [https://app.acementor.org/login](https://app.acementor.org/login)

2. Parent/guardian consent form - complete this either electronically through your ACE student account or complete the attached form and send it back to me (a pdf or photo of each page works).

If you have any questions, please let me know or see your school career coordinator or counselor for help.
Resend email or send direct link to parent/guardian (admin feature):

DIGITAL CONSENT FORM

- Resend Consent Form to Parent Email
- Consent Form Link for Parents
  If Parent does not receive consent form Email, you can provide them with this link.
- Edit Consent Form
- Remove Consent Form
• Required or they are not allowed to participate
• Required every 3 years
• Rely on Team Captains to remind mentors
• Same process as for students
• Help students and mentors complete their applications
• Remove obstacles to participate in the program
• Keep everyone safe
We will start the Q&A now, please continue to use the chat feature in GoToWebinar dashboard.

We will compile the Q&A in a follow-up document with a link to the recording of today's session.