

Status Check for Educational Status of a TM Club

Needed for club success plan information and/or to align base camp data with club central educational awards status. To protect my club members' information the screen shots below have all names whited out. If you have any questions for any step, you can email me at triplettmelissa@gmail.com

- Log in to www.toastmasters.org like normal. Go to club central for your club under the Leadership menu. You'll need this information open in one window while you work in basecamp in another.
- Log in as base camp manager (in another tab) for the club you want to check status for.
- Click on "Member progress"
- Click on "Options" : Choose refresh (wait. it takes time, sometimes minutes)
- Hover over Level 1 graph until arrow appears in upper right corner. Select export to excel
 - In excel,
 - Verify that you have data for all of your club members that are active on Pathways. (You can see this on the club roster in club central on the TI site. If you have a member that is in more than one club and they are signed in at another club, their information in base camp will not be present. In that case, send an email or text or phone call to that member and either wait for them to sign in with your club, or continue without them and add their data in later.)
 - Select all cells in the "grand summary" starting with the row just below grand summary and choosing all cells that have any data in them.
 - While the cells are in the gray select box, click the data menu tab, select sort.
 - Add two levels. Uncheck the box that says your data set has headings.
 - Select to sort by B E G, in that order. name (b) A-Z. path (e) A-Z. date (g) old to new. Press OK to perform the sort.
 - Note the date for each level 1 completion for each member. Take special note of any Level 1 In Progress. Here's a sample result: Each trio of rows for a member on a path with all projects listed as completed means they have earned the L1 for that path. I not this by bold facing the date for the last project.
 - If the date of completion is within this calendar year (2020 or 2019 is what I used to see if I had missed awarding anything on club central) Try to start processing an educational award for a member to see what level they should receive next. If Base camp says they have earned the level and Club central says they haven't gotten it yet, go ahead and make it official to align your records and get your members their awards and your club the credit for the DCP. Take note of any member who has achieved a level for this year and any member who is working on a level and is "In Progress".

Training Title	User Full Name	Count User ID	Transcript Status	Path the project is ass	Project Type	Last Transcript Status	LVL 1 Completions
Grand Summary (48)							
Ice Breaker		00348154	Completed	Innovative Planning	Required	05/26/2019 07:59 PM	
Evaluation and Feedback		00348154	Completed	Innovative Planning	Required	10/25/2019 10:39 PM	
Researching and Presenting		00348154	Completed	Innovative Planning	Required	01/18/2020 09:55 PM	
Ice Breaker		00348154	Completed	Motivational Strategies	Required	02/14/2020 08:46 PM	
Evaluation and Feedback		00348154	Completed	Motivational Strategies	Required	05/22/2020 07:43 PM	
Researching and Presenting		00348154	Completed	Motivational Strategies	Required	05/22/2020 07:46 PM	5/22/2020 Motivational Strategies
Ice Breaker		01116593	Completed	Innovative Planning	Required	08/11/2018 01:07 PM	
Evaluation and Feedback		01116593	Completed	Innovative Planning	Required	12/10/2018 03:05 PM	
Researching and Presenting		01116593	Completed	Innovative Planning	Required	12/10/2018 03:34 PM	
Ice Breaker		07753486	Completed	Presentation Mastery	Required	07/07/2020 12:58 PM	
Evaluation and Feedback		07753486	Completed	Presentation Mastery	Required	07/22/2020 09:41 AM	
Researching and Presenting		07753486	Completed	Presentation Mastery	Required	07/22/2020 09:45 AM	7/22/2020 Presentation Mastery
Researching and Presenting		02815754	Completed	Dynamic Leadership	Required	11/12/2018 02:41 PM	
Ice Breaker		02815754	Completed	Dynamic Leadership	Required	11/12/2018 02:53 PM	
Evaluation and Feedback		02815754	Completed	Dynamic Leadership	Required	01/22/2020 10:18 PM	
Ice Breaker		07513246	Completed	Persuasive Influence	Required	08/24/2019 01:02 PM	
Evaluation and Feedback		07513246	Completed	Persuasive Influence	Required	10/12/2019 07:15 PM	
Researching and Presenting		07513246	Completed	Persuasive Influence	Required	11/09/2019 03:56 PM	11/9/2019 Persuasive Influence
Ice Breaker		07556321	In Progress	Leadership Development	Required	10/12/2019 09:25 PM	In Progress Leadership Development

- Ask any members of multiple clubs not listed to sign on to base camp for the club you are checking. And repeat.

- Repeat the excel process for Levels 2-5.
- Collect all of the information in one location for a complete picture of the club. Here's a snapshot of what my report information looked like

A	B	C	D	E	F	G	H	I	J	K	L	M
	4 needed	2020-2021	Level 1					Recorded with TI				
			7/22/2020	1		Presentation Mastery		Yes				
			7/8/2020	2		Presentation Mastery		Yes				
			6/15/2020			Dynamic Leadership		Award to another club				
			1/19/2019	3		Persuasive Influence		Yes				
			5/22/2020			Motivational Strategies		Award to another club				
			In Progress			Presentation Mastery		4?				
			In Progress			Visionary Communication		?				
			In Progress			Presentation Mastery		4?				
			In Progress			Leadership Development		?				
	2+2 needed	2020-2021	Level 2									
			7/14/2020			Motivational Strategies		Award to another club				
			7/29/2020	1		Presentation Mastery		Yes				
			7/8/2020	2		Presentation Mastery		Yes				
			5/23/2020	3		Persuasive Influence		Yes				
			In Progress			Dynamic Leadership		4?				
			In Progress			Dynamic Leadership		Award to another club?				
			In Progress			Presentation Mastery		4?				
	2 needed	2020-2021	Level 3									
			10/14/2019	1		Innovative Planning		Yes				
			In Progress			Presentation Mastery		2?				
			In Progress			Persuasive Influence		2?				
			In Progress			Team Collaboration		Award to another club				
			In Progress			Presentation Mastery		2?				
			In Progress			Strategic Relations		2?				
	1+1 needed	2020-2021	Level 4,5, DTM									
			In Progress			Innovative Planning	Ivl 4	2?				
			In Progress			Innovative Planning	Ivl 4	2?				
			In Progress			Motivational Strategies	Ivl 4	2?				
			In Progress			Visionary Communication	Ivl 4	1?				
			In Progress			Effective Coaching	Ivl 5	Award to another club				

Requirements for a level completion: You must check the completed or in progress field before you are sure the Level has been completed.

Level 1: 3 Projects **completed**. (same three for everyone)

Level 2: 3 Projects **completed**. (2 required and one on mentoring)

Level 3: 3 Projects **completed**. (2 required, 1 optional)

Level 4: 2 Projects **completed**. (1 required, 1 optional)

Level 5: 3 Projects **completed**. (1 required, 1 optional, 1 DTM)

Here's a snapshot of our club status for the year with the pathways tracker file: I was able to find all of this information by using the above process. Levels completed in the past I grayed the cells. Levels that were completed and recorded for this calendar TM year DCP are in orange. I love being able to see the club progress in a single picture.

Pathways tracker Plus Factor - Excel

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General

Normal Bad Good Neutral Calculation Check Cell

Clipboard Font Alignment Number Styles Cells Editing

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	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T
1			Level 1					Level 2			Level 3			Level 4		Level 5				
2	Member	Path L#	Co Icebreaker	Eval 1	Eval 2	Eval Eval	Res& Pres	Req 1	Req 2	Ment Intr	Req	Option 1	Option 2	Req	Option	Req	Option	Reflect		
3		IP3	5/26/2019	10/25/2019	10/25/2019	10/25/2019	1/18/2020	3/9/2020	4/12/2020	5/3/2020	5/4/2020	5/17/2020	5/31/2020	In Prog						
4		MS0	2/14/2020	5/22/2020	5/22/2020	5/22/2020	5/22/2020	7/10/2020	7/14/2020											
5		IP2	8/11/2018	12/10/2018	12/10/2018	12/10/2018	12/10/2018	4/6/2019	5/20/2019	6/21/2019	7/31/2019	9/5/2019	10/14/2019	In Prog						
6		PM2	7/7/2020	7/22/2020	7/22/2020	7/22/2020	7/22/2020	7/28/2020	7/29/2020	7/29/2020	7/29/2020									
7		DL0	11/12/2018	11/12/2018	11/12/2018	11/12/2018	1/22/2020	In Prog												
8		IP0																		
9		PI2	8/24/2019	10/12/2019	10/12/2019	10/12/2019	11/9/2019	4/28/2020	4/28/2020	5/26/2020	6/17/2020	7/29/2020								
10		LDO																		
11		MS3	3/17/2018	7/7/2018	7/7/2018	7/7/2018	7/7/2018	7/31/2018	8/12/2018	8/12/2018	12/19/2018	1/22/2019	7/14/2019	In Prog						
12		TC2	4/14/2018	6/6/2018	6/6/2018	6/6/2018	7/28/2018	8/25/2018	1/11/2019	2/12/2019	In Prog									
13		PM2	8/10/2019	10/22/2019	10/22/2019	10/22/2019	7/8/2020	7/8/2020	7/8/2020	7/8/2020	7/8/2020	7/11/2020								
14		DL0	6/15/2020	6/15/2020	6/15/2020	6/15/2020	6/15/2020	In Prog												
15		EC4	3/26/2018	6/10/2018	6/10/2018	6/10/2018	6/22/2018	7/30/2018	8/10/2018	8/12/2012	11/4/2018	2/26/2019	3/7/2019	5/26/2019	2/28/2019	6/15/2020	In Prog			
16		VC3	5/6/2018	7/30/2018	7/30/2018	7/30/2018	7/30/2018	10/7/2018	10/15/2018	3/9/2019	7/27/2019	7/19/2019	9/7/2019	In Prog	6/15/2020					
17		Mentor									In Prog									
18		PM0	8/10/2019	8/16/2019	In Prog															
19		SR2	3/3/2018	6/3/2018	6/3/2018	6/3/2018	6/3/2018	8/11/2018	10/21/2018	11/10/2018	In Prog	12/16/2018	9/7/2019							
20		VCO	3/16/2019	In Progress			9/24/2019													
21		PM0	1/25/2020	5/9/2020	In Prog		7/4/2020	In Prog												
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