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@ymail.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".

- - 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				
			11/9/2019	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	lvl 4	2?				
			In Progress			Innovative Planning	lvl 4	2?				
			In Progress			Motivational Strategies	lvl 4	2?				
			In Progress			Visionary Communication	lvl 4	1?				
			In Progress			Effective Coaching	lvl 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.

		Level 1				Level 2				Level 3			Level 4		Level 5		
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
	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	In Prog			
	MS0	2/14/2020	5/22/2020	5/22/2020	5/22/2020	5/22/2020	7/10/2020	7/14/2020									
	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				
	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							
	DL0	11/12/2018	11/12/2018	11/12/2018	11/12/2018	1/22/2020	In Prog										
	IP0																
	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						
	LD0																
	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				
	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							
	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						
	DL0	6/15/2020	6/15/2020	6/15/2020	6/15/2020	6/15/2020	In Prog										
	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	
	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			
	Mentor									In Prog							
	PM0	8/10/2019	8/16/2019	In Prog													
	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					
	VC0	3/16/2019	In Progress			9/24/2019											
	PM0	1/25/2020	5/9/2020	In Prog		7/4/2020	In Prog										