

# TM Tracker V1.1a Overview

TM Tracker is divided into 9 tabs, each with its own purpose. It was originally designed for the “Of The Year” awards, but it is useful in tracking a club member’s progress. It can show where a member may need help or encouragement in completing a role. It can, more importantly, point out member achievements that need celebrating.

The nine tabs that can be found along the bottom of the screen are;

1. Clubs
2. Membership
3. Signup
4. Full Agenda
5. Half Agenda
6. Roles
7. Outside the Club
8. Totals
9. DCP

A basic description of each tab is listed below.

## Clubs Tab

If this tab is not visible at the bottom of the screen, click the left pointing arrow just above the word “Ready”. The sole purpose of this tab is to set up club information in the rest of the spreadsheet. There is space for up to 10 clubs in list. I have provided 2 club’s information. To include your club, either add it to the bottom of the list or replace one of the clubs provided. Type your club’s number in cell C1.

This spreadsheet is set up for clubs meeting every week. For clubs meeting every other week, just ignore the parts of this spreadsheet that refer to the weeks without meetings. For clubs meeting on a monthly basis, you will have to find someone with knowledge of Excel spreadsheets to make adjustments.

## Membership Tab

Click on the membership tab to enter the roster information for your club members. The member #, first name, last name, executive position and member since columns are referenced by other parts of the spreadsheet.

You can add columns by clicking a column letter above the club name. Right-click the column letter and select “Insert” from the menu that appears. You can also add extra rows for more

members by clicking a row number at the left edge of the screen. Right-click the row number selected and click “Insert”. Any functions/formulas that need to be changed will adjust automatically.

I have included an advisory statement at the bottom of the membership list, which I highly recommend being used in any distributed version of the membership list. If the advisory is not included in a distributed list, anyone getting a copy could use it for any purpose, such as adding it to their sales call list. With the advisory included, using the membership list for any purpose other than club business could place the user in legal trouble.

If you don't have a list of the members, a member of your club's executive can download a copy from Toastmasters International.

### **Signup Tab**

This tab lists the roles for the club along the left side of the sheet. The date for the first meeting is calculated in cell B5. This cell references the “Clubs” tab to do this calculation. The rest of the dates are calculated from cell B5. Clubs meeting every other week can hide the unused columns by right-clicking the unused column and selecting “Hide” from the popup menu. Columns can be unhidden by holding down the shift button and selecting the columns directly before and after the hidden column. Let go of the shift key and right-click the highlighted columns. Select unhide from the popup menu.

Unused roles can also be hidden by selecting the row number for that role, right click the row number and select “Hide”.

Enter the names of the members that are taking each role and the theme for each date. This information will be drawn by the 2 agenda tabs during the week prior to and including the date of the next meeting.

To select a restricted portion of the signup tab for printing, drag the mouse pointer over the area to be printed. Be sure to include the role description and the number of week that you want to print (probably 6 to 8 weeks).

### **Full Agenda Tab**

This is a sample agenda which draws the club name, Club meeting information and the date of the next meeting from the “Clubs” tab. It also draws a list of the club executive from the “Membership” tab. Be sure that the executive positions on the “Membership” tab are spelled exactly like the names listed on this sample agenda.

Adjustments to this agenda can be done by someone familiar with Excel. The functions/formulas in this agenda are complex.

### **Half Agenda tab**

This is a half page version of the previous agenda tab. If you print double sided it will print an area for speaker comments and voting forms on the back of the agenda.

## Roles Tab

This is where most of the action takes place. I usually take about 5 minutes a week on this page. Enter the member #, first and last name of the members in the appropriate columns. The dates of each week's columns are calculated from the "Clubs" tab. Each week consists of 2 columns. The first column is where you enter the codes for the role(s) that each member has fulfilled. A legend of the codes is supplied on rows 1 and 2. The second column is where you enter the number of new guests that the member has brought to that meeting.

Scroll right by either pressing the right arrow key several times or dragging the scroll bar at the lower right of the screen until you get to column DG. In this section enter the codes for the meeting awards (Best Table Topics, Best Speaker etc.) that the member has won.

Unused columns and other columns that you don't want displayed, can be hidden. The functions/formulas that refer to these cells will still use the contents of the hidden columns.

At the bottom of each pair of columns is a cell where you can enter the number of new guests that are not specifically invited by a member and the number of returning guests. The invited guests and total attendance are automatically calculated.

## Outside the Club Tab.

Use this tab to enter the events that a club member has attended as a Toastmaster. Sample events have been included and the names of these events can be replaced by real events. Columns for more events can be inserted as previously discussed. Functions/formulas that refer to these columns will be adjusted.

The legend at the right can be defined as;

"Leader" means that you organized the event. "Participated" means that you fulfilled a role such as speaker or evaluator at the event. "Attended" means that you at least provided a (preferably) warm body to fill one of the seats.

## Totals Tab

This page summarizes each member's activity. The only columns that are **NOT** calculated are;

- Guests Sponsored
- Newsletter
- Speech Contestant
- Area Contest
- Demo Meeting
- Conducted Training
- Membership Campaign
- Rebuilding a Club

This page was designed for the “Of The Year” awards. It will quickly point out which members have excelled at the various responsibilities of a Toastmaster. It can also point out what roles a member has been avoiding. This gives a great chance to speak to the individual member and encourage them to tackle the avoided role(s). This tab could also be printed periodically and provided to the membership. Members that I have shown this page to, have almost always been surprised at their record. They had thought that they had performed some of the roles either more or less than what the record shows. This allowed them to make adjustments to their signups.

### DCP Tab

This tab helps give an idea of where the club is in the DCP plan. It also shows which members have contributed. This tab was designed as part of the club doing a DCP educational presentation. You could then ask members to volunteer to complete one of the educational achievements. It has been adjusted for Pathways.

Enter the names of each member that has volunteered to achieve one of the educational components in the “Anticipated” column. As each component is achieved by the member, enter their name in the “Completed” column. The DCP points are calculated automatically.

As your club achieves new members you can enter the first 8 members in points 7 and 8. For Point 9 “Club Officers Trained”, The list of executive offices is supplied and the names of the officers in the executive roles are automatically entered in the anticipated column. Enter the names of the trained officers in the completed column. DCP point will be automatically calculated.

Administrative points can be completed by entering “Yes” into the completed column.

In the anticipated column at the bottom of the form enter the Membership Base as recorded by Toastmasters International as well as entering the Current Membership number. As DCP qualification is achieved for the appropriate award, the completed column will display “ACHIEVED” for the appropriate award.

### Summary

This is a brief description of the use of and purpose of the TM\_Tracker spreadsheet. It is a good idea to keep a blank copy as you will need to use a new copy each year. I welcome comments, bug reports, requests for improvements and requests for assistance. You can contact me at;

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