Learn Local Training Reporting Guide

THE GLOBAL LEADERSHIP TEAM (GLT) LOCALLY ORGANIZED TRAINING

Table of Contents

Overview	2
Reporting Guidelines	3
Prepare to share Local Training on "Learn"	4
Access "Learn" with your Lion Account	5
Manage Training	5
Add Training	7
Edit Training	9
Cancel Training	9
Report Completed Training	9
Multiple Participant Upload	13
Appendix	20
How to select the appropriate Training Type	20
How to select the appropriate Audience	20
How to report training that occurs over an extended period of time	21
How to ensure zone chairperson training or club officer training counts toward the distric	ct
leadership development goal	21
Questions	22

Overview

Learning for every Lion and Leo is an important benefit to the growth and development of Lion and Leo members, clubs and communities. The goal of the Global Leadership Team (GLT) is to provide learning opportunities to more than 500,000 Lions and Leos annually.

As a GLT coordinator, your help is needed to track and report local training related to leadership development, membership development and service in your multiple district or district. The sharing of local training information allows Lions Clubs International to better support the multiple districts' and districts' annual training plan. In addition, reporting of local training assists in building and providing our Lion and Leo members with a comprehensive learning record. Reference this guide to share and report local training. Each section will provide you with the necessary steps to accurately enter, publish and report local training information along with the ability to upload an Excel spreadsheet of institute participants all at one time.

All events that bring people together are critical to the success of Lions Clubs International. However, not all events are considered training. Use the table below to determine if a planned event meets the requirements for training. If the planned event is training, ensure the local training is reported in the Manage Training section of Learn.

.

	Training	Conferences/ Conventions/Forums	Meetings
Event Purpose	- Develop or Improve Skills - Change behaviors	- Informational - Strategic Plans - Organizational Update	- Informational - Strategic Plans - Organizational Update
Audience Size	Limited to allow all participants to fully contribute	No size limit	No size limit
Faculty Requirement	1–2 Faculty per classroom	Not required	Does not apply
Interaction During Event	Active (two-way)	Passive (one-way)	Passive (one-way)
Interactive Learning with the Expectation to Use New Skills	Yes	Optional	No
Knowledge Check or Assessment	Yes	Optional	No
Opportunity to Practice New Skills During Event	Yes	Optional	No
Attendee Attendance Tracking	Yes	No	No
Documented Event Feedback	Yes – training evaluations	Optional	No

- Club Officer Training - Guiding Lion Training - Zone Chairperson Trainin - 1st Vice District Governo Training - Global Membership Appro Trainings (Build A Team, B A Plan, Build A Vision, Bu Success) - Supporting Membership Training - Leading a Service Project	ng - Multiple District Convention - District Convention each uild ild	 - Multiple District or District Meetings - Club Meetings - Service Team Meetings
---	---	--

RETURN TO TABLE OF CONTENTS

Reporting Guidelines

- All GLT coordinators should enter a list of planned training for the current fiscal year (July 1 – June 30) in the Manage Training section of Learn. Planned training should be updated as new training is confirmed.
- Completed training should be reported monthly in the Manage Training section of Learn.
 If a planned training is cancelled, the cancellation should be reported as soon as possible.
- All training event data will need to be reported by the GLT coordinator, including trainings organized by someone other than the GLT coordinator:
 - GLT MD coordinators should report area- or MD-organized training, (i.e.FVDG or SVDG training or Global Membership Approach training)
 - → GLT district coordinators should report district- and club-organized training (i.e., Zone Chairperson Workshop, Club Officer Training)

Do not report any of the following - Submit local institute documents to institutes@lionsclubs.org.

- Regional Lions Leadership Institute (RLLI)
- Emerging Lions Leadership Institute (ELLI)
- Advanced Lions Leadership Institute (ALLI)
- Faculty Development Institute (FDI)
- During the training, verify faculty and participant information. The <u>Training</u>
 <u>Attendance and Consent Form</u>, available in the <u>GLT Toolbox</u> on the Lions Clubs
 International website, may be used to collect this information.
- Participants may be Lions or Leos. Training events for non-Lions will not be counted in our global training data totals. Only participants who have a membership ID registered at Lions Clubs International will be recognized.
- Faculty may be Lions, Leos or external trainers. There is a separate field to report non-Lion faculty.
- Ensure zone chairperson training or club officer training counts toward district leadership development goal
- Once training data has been successfully submitted in the Manage Training section of Learn, there is no need to provide supporting documentation such as the Training Attendance and Consent Form to Lions Clubs International, unless specifically requested (i.e., for grant reimbursements).

DO NOT REPORT the following activities as training:

- Presentations or delivery of reports at meetings (Remember, presentations and reports are not training.)
- Attendance at meetings
- Communications to promote training, such as emails, newsletter and/or reports.
- Time spent identifying new or potential leaders and/or participants for training.
- Time spent creating new training or revising existing training.
- Participants who attend a Lions Clubs International hosted institute at the
 constitutional area level or locally hosted institute (Regional Lions
 Leadership Institute (RLLI), Emerging Lions Leadership Institute (ELLI),
 Advanced Lions Leadership Institute (ALLI), Faculty Development
 Institute (FDI). Participants who attend these institutes will be reported by
 the Leadership Development Division. If you report these participants, they
 will be counted twice.

RETURN TO TABLE OF CONTENTS

Prepare to share Local Training on "Learn"

Finalize your MD's or district's annual local training plan for the current fiscal year (July 1 – June 30). Include the information listed below as you finalize your training plan. Confirming local training details will allow you to easily add and share your local training in the via the "manage training" feature in Learn.

- Course Name
- Course Language(s)
- Training Type(s)
- Audience(s)
- Estimated Number of Participants
- Training Dates, including start and end times
 - NOTE: Training dates should be consecutive days and not reflect an extended period of time, such as multiple months or the entire year.
 - How to report training that occurs over an extended period of time
- Location, including address, city, state and country

Note: Ensure zone chairperson training or club officer training counts toward district leadership development goal

Do not report any locally hosted Regional Lions Leadership Institute (RLLI), Emerging Lions Leadership Institute (ELLI), Advanced Lions Leadership Institute (ALLI), or Faculty Development Institute (FDI). Submit local institute documents to institutes@lionsclubs.org.

Access "Learn" with your Lion Account

The Manage Training section is part of the "Learn" application within the Lions Clubs' Member Portal. Access is available on the <u>Lions Clubs International</u> website by selecting the <u>Member Login</u> link and using your individual Lion Account login and password.

Upon accessing the "Learn" page, select "Manage Training" in the middle of the page. Only the GLT coordinators on record with Lions Clubs International will have access to "Manage Training".



RETURN TO TABLE OF CONTENTS

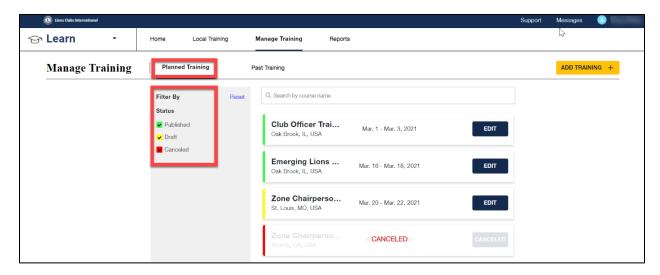
Manage Training

In the "Manage Training" section, the GLT coordinators will be able to add, edit and report local training information. The GLT coordinators may add and/or edit local training at any time. It is recommended, that the GLT coordinators report completed training monthly.

NOTE: Only the GLT coordinators will have access to the "Manage Training" section.

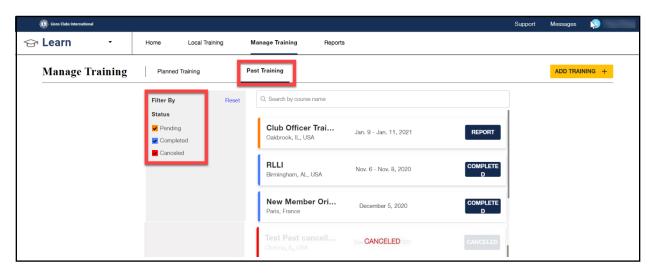
The **Planned Training** tab lists all future training (i.e., any training with an end date of today or later.).

- Green indicates training is **PUBLISHED** on "Learn" and viewable by any Lions or Leos in your MD or district.
- Yellow indicates training is a DRAFT version and is only viewable by the GLT coordinator that created the local training. DRAFT versions will automatically move from "Planned Training" to "Past Training" when the end date of the DRAFT training has passed.
- Red indicates a future training is **CANCELED** and is viewable by any Lions or Leos in your MD or district.



The **Past Training** tab will list all past training (i.e., any training with an end date of yesterday or earlier.).

- Orange indicates training is **PENDING** and requires additional information from the GLT coordinator to report the training as complete or canceled.
- Blue indicates training is **COMPLETED** and requires no further action. The coordinator has successfully submitted and reported the training.
- Red indicates training is **CANCELED** and requires no further action. The GLT coordinator has successfully submitted and reported that the training was canceled.



Add Training

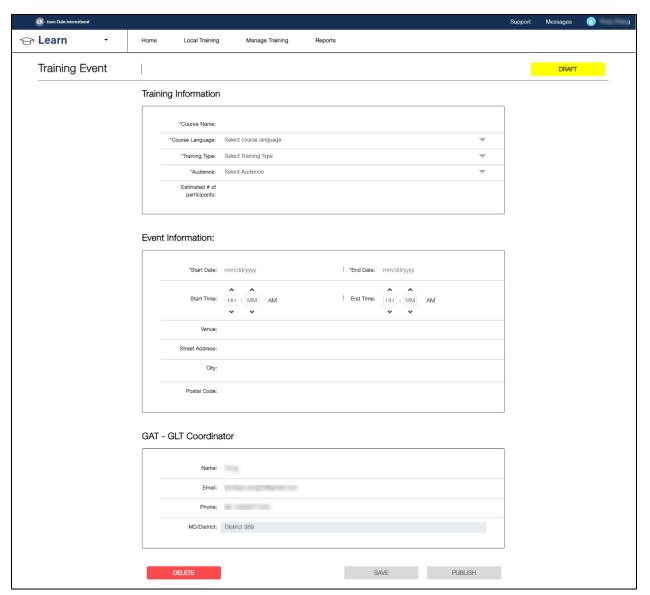
GLT coordinators may add training on the Manage Training page.



- 1. Select "ADD TRAINING"
- 2. A blank form will appear. (See next page.) Complete the requested information.
 - a. How to select appropriate Training Type(s)
 - b. How to select the appropriate Audience(s)
 - c. How to report training that occurs over an extended period of time
- 3. "SAVE" or "PUBLISH" the training
 - a. "SAVE" will save a **draft** version that is only available to the GLT coordinator that created it.
 - b. "PUBLISH" will save a version that will be available for all Lions and Leos in your MD or district to view.
 - Published training will appear in the Local Training section according to the date of each training. Earlier training will appear first. Once a training date has passed, the training will automatically be removed from the Local Training section.

NOTE: If the GLT coordinators add local training that is already completed (with an end date of yesterday or earlier), the local training will automatically appear on the "Past Training" section.

Sample Training Event Form



Edit Training

GLT coordinators may edit local training if the training status is "Published" or "Draft". Edits may be made from the Manage Training – Planned Training tab.

- 1. From the Planned Training tab, select the "Edit" button of the training you want to edit.
- 2. Edit local training information as needed.
- 3. If the local training status was "Published", the updated information will automatically appear on the Local Training page.
- 4. If the local training was "Draft", you will have the option of saving again as a "Draft" or selecting "Publish" which will publish the training on the Local Training page.

RETURN TO TABLE OF CONTENTS

Cancel Training

The GLT coordinators may cancel any local training that has a status of "Draft", "Published" or "Pending". Local training that has a status of "Complete" may not be canceled. Once a local training status is changed to "Canceled" no further changes may be made.



You may cancel training from either the Planned Training or Past Training tabs on the Manage Training page.

- 1. From the Planned Training tab, select the "Edit" button of the training you wish to cancel. From the Past Training tab, select the Report button of the training you wish to cancel.
- 2. Scroll to the bottom of the page. In the lower left corner, click on the "Cancel" button.
- 3. A pop-up box will appear. Select the reason the training was canceled. Select all reasons that apply.
- 4. If selecting "Other", please indicate the exact reason for canceling the session.
- 5. Select "Submit". A new pop-up will appear confirming that your cancelation was successfully submitted.
- 6. Select "Return" to return to the Manage Training page.

RETURN TO TABLE OF CONTENTS

Report Completed Training

Before reporting completed local training, the GLT coordinators should confirm participant and faculty information (including member ID and club ID). It is recommended that participant and faculty information is collected and verified during training. The Training Attendance and Consent Form, available in the GLT Toolbox on lionsclubs.org, may be used to collect this information.

Note: Participant and faculty information will not be available to all Lions. This information will be used to track participation, faculty use and for data analysis.

The GLT coordinators will report completed training on the Manage Training – Past Training tab. There are two options to report completed training – "Add Training" if the training is not already listed on the Past Training tab or if the training is on the list, select the "Report" button.

"ADD TRAINING" allows the GLT coordinators to add any completed training that was not previously Published or created as a Draft.

Select "ADD TRAINING"

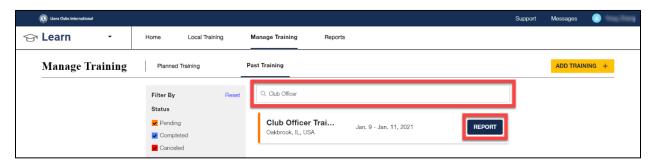
- 1. A blank form will appear. Complete the requested information.
 - a. How to select appropriate Training Type(s)
 - b. How to select the appropriate Audience(s)
 - c. How to report training that occurs over an extended period of time



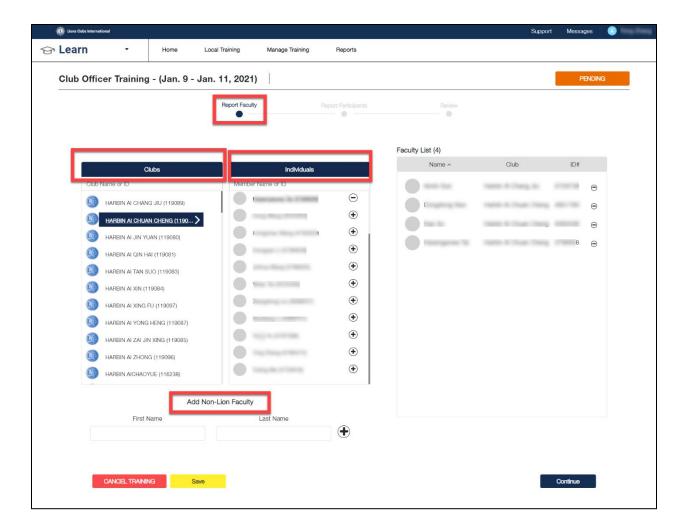
- 2. "SAVE"
 - a. "SAVE" will save a Pending version that is only available to the GLT coordinator that created it.
- 3. Once the training is saved, the "Continue" button will become available.
 - a. "Continue" will open a new window that will allow the GLT coordinator to add and confirm the faculty.
- 4. From this step, the rest of the instructions are the same as selecting the "Report" button from the Past Training tab.

From Past Training

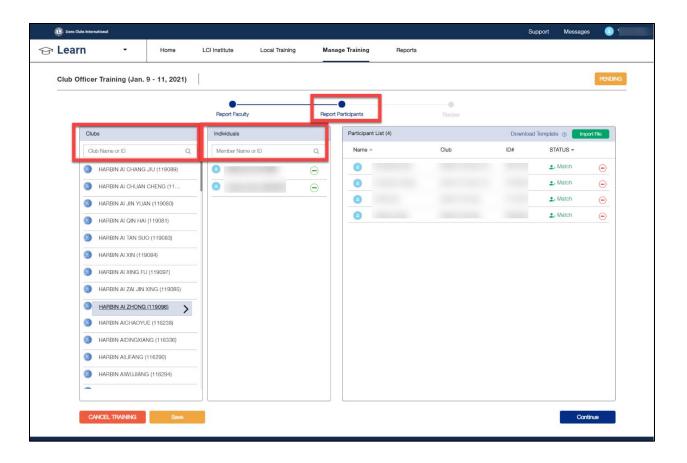
1. Find the training in the list of past training. You may use the search feature to search by course name.



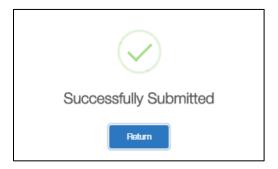
2. Once you have identified the correct training to report, select "REPORT". A new window will open that will allow the GLT coordinator to add and confirm faculty.



- i. Add all faculty Lions or external (Non-Lions) faculty. Lions and Leos on record with Lions Clubs International (who have a member ID) may be added. Search for faculty under Clubs by entering a club name and expanding the list of club members. Search under Individuals by entering either the faculty name or member ID. Click on the "+" sign next to each faculty's name to add faculty to the Faculty List.
- ii. Non-Lions are for any faculty who do not have a member ID. Enter the faculty First Name and Last Name.
- a. Once faculty are selected, their names will appear in the Faculty List. Verify the correct faculty have been entered. "Go Back" to edits the faculty list as needed.
- b. Once the Faculty List is correct, select "Continue".
- 5. A new page will appear, allowing the GLT coordinator to add participant information. Only Lions on record with Lions Clubs International (who have a member ID) may be reported. Search for participants under Clubs by entering a club name or club ID and expanding the list of club members. Or search under Individuals by entering either the participant's name or member ID. Click on the "+" sign next to each participant's name to add participants to the Participant List. For reporting a large list of participants, see the "Multiple Participant Upload" instructions.



- a. Once a participant is selected, their names will appear in the Participant List. Verify the correct participants have been entered. Edit as needed.
- b. Once the Participant List is correct, select "Continue".
- 6. A new page will appear, listing all the information that will be submitted for the training. If necessary, you may make changes to all training details prior to submitting the final training data.
- 7. If the information is correct, click "SUBMIT". A pop-up will appear reminding you this information is considered final. This is the final opportunity to edit any information before submitting the official record of the training. Please review carefully.
- 8. Click "SUBMIT" to officially submit the training as complete. A "Successfully Submitted" pop-up will appear. Select "Return" to go back to the Manage Training and continue to update local training information as needed.



NOTE: At any time during the reporting of faculty and participant names, you may Save and exit out of that training form. Any information entered will be saved and viewable by the GLT coordinator. Once the "SUBMIT" button is selected a GLT coordinator may make no further changes to the faculty or participant. If faculty or participant data needs to be updated, the GLT coordinator should contact their GAT specialist (gat@lionsclubs.org) for assistance.

RETURN TO TABLE OF CONTENTS

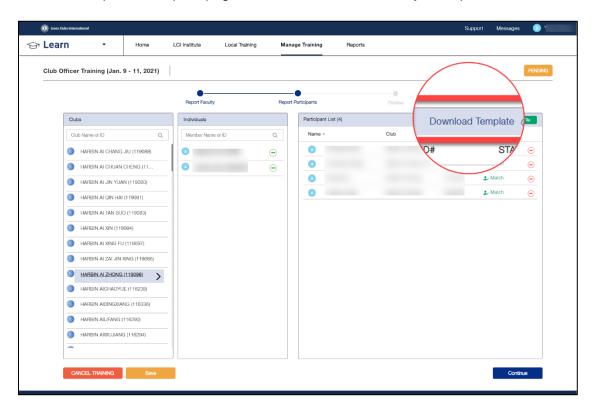
Multiple Participant Upload

A large number of participants can be imported all at one time by completing these 3 steps:

- 1. Download the custom Excel template and enter participant information
- 2. Import the Excel file
- 3. Reconcile and confirm the imported participants

Step One: Download the Excel Template

From the Report Participant page select the **Download Template** option.



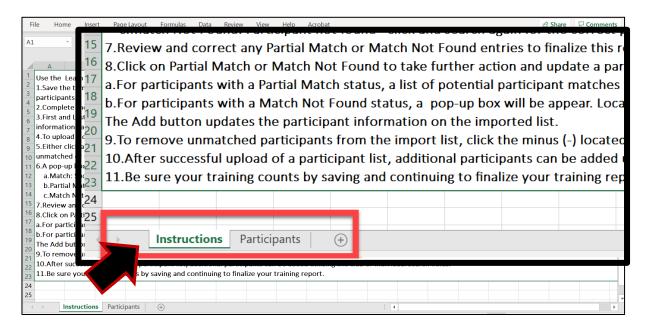
The Document Template is a custom Excel template that will allow GLT Coordinators to quickly upload training participants.

The template has two tabs.

- 1. Instructions
- 2. Participants

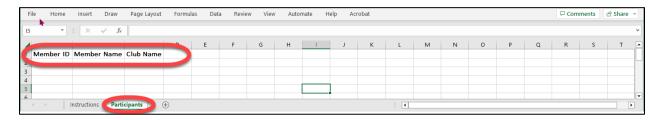
Instructions Tab

The Instructions Tab contains the directions for the proper use of the template. Please read this page **thoroughly** and follow the instructions.



Participants Tab

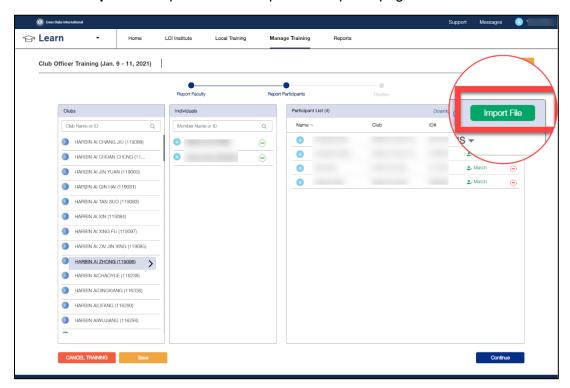
On the Participants Tab, GLT Coordinators will add the Member ID, First Name, and Last Name and Club Name for each participant. Remember to complete this tab with the member's information as listed the Lions Clubs International's membership database. If you do not have this information, check with the member's club secretary for the correct details.



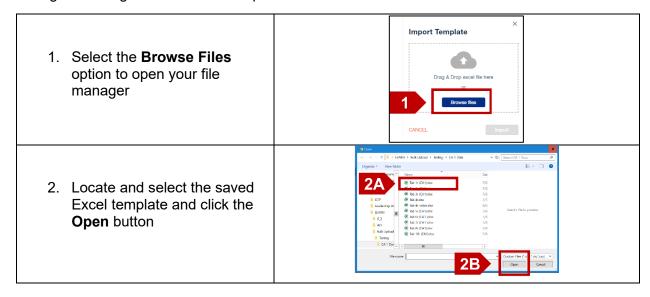
When all of the participant data is complete, name the document and save it in a place where you can easily find it. Do not change the format of the template. The template can only be uploaded in Excel format (.xlsx or .xls).

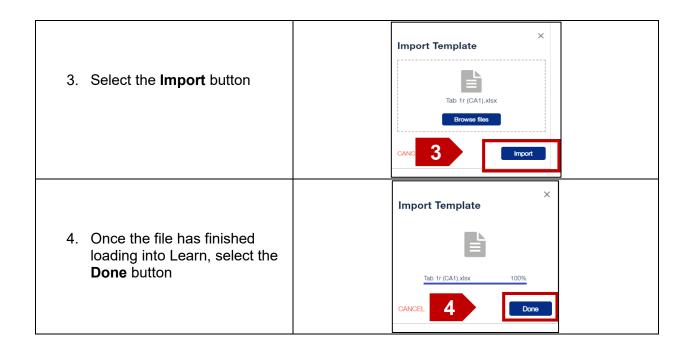
Step Two: Import the Excel file

Select the Import File option on the Report Participants page.



Just like attaching a file to an email or uploading photos to a webpage, this process will take you through selecting the correct file to upload.





Step Three: Reconcile and Confirm Participants

The final step in the process is to reconcile and confirm the participant list. As the Learn database attempts to match your participants with the Lions Club's membership database, there are three statuses that you may see after you have loaded the Excel sheet.

- Match Perfect participant match. No action is required
- Partial Match Participant data matched one or more members. Action is required.
- Match Not Found No participant match was found. Action is required.

Match

If the participant data matches the Lions Club's membership database, you will see the following message confirming the match.



At this point, no further action is required for this participant.

Partial Match

If the participant data partially matches the Lions Clubs International's membership database, you will see a message asking you to confirm the correct participant.

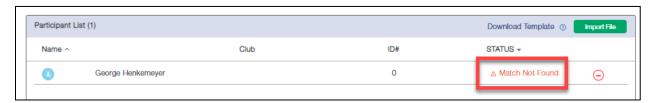


Select the drop-down arrow \checkmark next to the status message **Partial Match** to open a member section box. Select the correct member.

Note: Learn accepts English characters only - no nicknames or special characters will be recognized

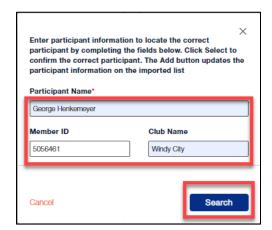
Match Not Found

If the membership data uploaded does not match the Lions Club's Membership database, Learn will return a **Match Not Found** message.

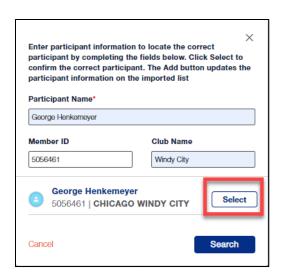


Select the Match Not Found message to continue.

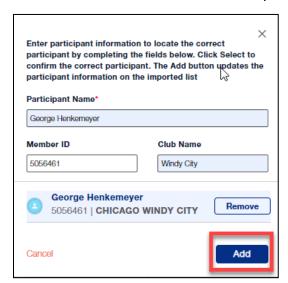
A pop-up box will open requesting you re-enter the participant's data and click the **Search** button.



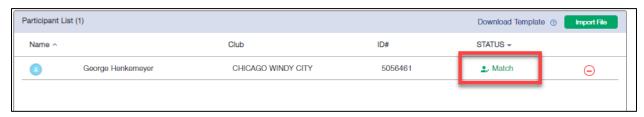
If the data matches the Lions Club's membership database, Learn will return a list of possible options. Click on the **Select** button to choose the correct participant.



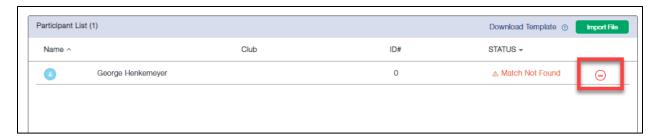
Click on the **Add** button to confirm the participant.



Learn will return to the Participant List page where you will continue to reconcile and confirm your remaining participants.

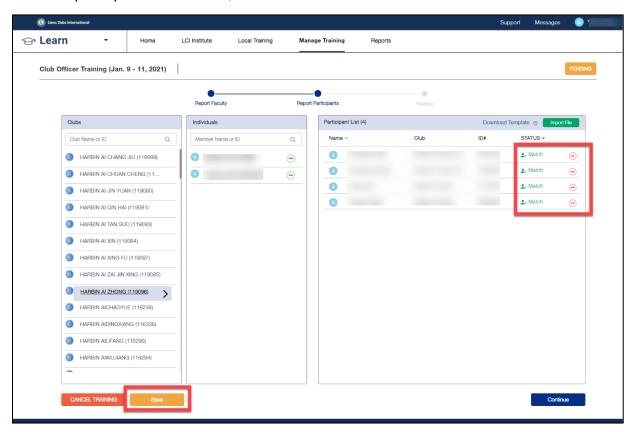


Note: If Learn is not able to match the participant data, delete the participant by selecting the red minus sign and saving the training event. Check the participant data with the member's club secretary to confirm the correct participant data.



Note: You will not be able to **Save** or **Continue** with a training event record until all the error messages are reconciled or removed from the list of participants. **NOTE: Any participant information not saved before exiting will not be saved or viewable by the GLT coordinator.**

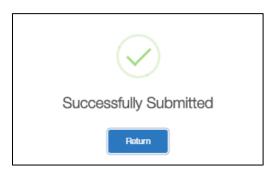
Once the participant list is correct, select "continue".



A new page will appear, listing all the information that will be submitted for the training. If necessary, you may make changes to all training details prior to submitting the final training data.

If the information is correct, click "SUBMIT". A pop-up will appear reminding you this information is considered final. This is the final opportunity to edit any information before submitting the official record of the training. Please review carefully. Once the "SUBMIT" button is selected a GLT coordinator may make no further changes to the faculty or participant list may be made. If faculty or participant data needs to be updated, the GLT coordinator should contact their GAT specialist (gat@lionsclubs.org).

Click "SUBMIT" to officially submit the training as complete. A "Successfully Submitted" pop-up will appear. Select "Return" to go back to the Manage Training and continue to update local training information as needed.



RETURN TO TABLE OF CONTENTS

Appendix

How to select the appropriate Training Type

"Training Type" will be used to identify the type(s) of training offered. GLT coordinators will select the appropriate training type(s) based on the training materials and topics covered. There are five (5) standard training types:

- Orientation Training Any training delivered to new members (3 years or less)
- Incoming/New Officer Any training for incoming and/or new officers (all levels of the association)
- Technical Skills Any training that is related to learning a specific task (For example: chartering a club; completing LCIF grant applications; train the trainer courses - FDI, LCIP, CGL; creating a specialty club, using service planners, or MyLion/MyLCI)
- Interpersonal Skills Any training that is related to developing leadership skills (For example: conflict management, communication, team development, public speaking, or active listening)
- Programs and Initiatives Any training that is related to specific Lions Clubs
 International programs and initiatives (For example: The Service Journey or Club Quality
 Initiative)

The GLT coordinators should select all training types that apply to each training reported. For example, a New Member Orientation training might include training on how to access the Lionsclubs.org website and the Service Journey. To report the training type for this training, the GLT coordinator would select "Orientation Training", "Technical Skills" and "Programs and Initiatives" as the Training Types.

RETURN TO TABLE OF CONTENTS

How to select the appropriate Audience

The GLT coordinators will have the following options for "Audience":

New members (0-3 years)

- Experienced members (3+ years)
- Club Officers (current and/or incoming)
- Zone and Region Officers (current and/or incoming)
- District Officers (current and/or incoming)
- Multiple District Officers (current and/or incoming)
- Lions only
- Leos only
- All members Lions and Leos
- Other: Open Text

The GLT coordinators should select the appropriate "Audience" for each training being reported. If needed, multiple options may be selected. For example, a Club Officer School may include zone chairpersons at the training. When reporting this training, the coordinator would select "Club Officers" and "Zone and Region Officers".

RETURN TO TABLE OF CONTENTS

How to report training that occurs over an extended period of time

If a local training occurs over a series of weekends or months, rather than consecutive days, each session should be reported separately.

For example, a club officer training occurs from May 1st to June 30th. The invited participants – incoming club officers – will attend in-person training for 4 Saturdays during this time period. Each session should be reported separately and identify the specific date of each session:

- Club Officer Training Session 1 (May 2, 2021)
- Club Officer Training Session 2 (May 23, 2021)
- Club Officer Training Session 3 (June 13, 2021)
- Club Officer Training Session 4 (June 27, 2021)

Not all participants nor faculty may be able to attend each session. By reporting each session separately, the GLT coordinator will be able to identify and confirm the faculty and participants at each session.

If the training was entered as an extended session over 2 months (May 1st to June 30th), then the system would calculate the training as 60 days long. In addition, any reported participants and faculty would have 60 days of training be added to their individual training records.

RETURN TO TABLE OF CONTENTS

How to ensure zone chairperson training or club officer training counts toward the district leadership development goal

- 1. Verify the date of the zone chairperson or club officer training event falls within the eligible range to be counted (March 1st of previous year thru March 31st the year goal is for)
- 2. Choose the correct Audience:
 - For Zone Chairperson Training the audience should be Zone and Region
 Officers (current and/or incoming)

- b. For Club Officer Training the audience should be **Club Officers (current and/or incoming)**
- 3. Report the zone chairperson/club officers as participants of the training event (using their name, member ID or club to locate them
- 4. Confirm each zone chairperson has the zone chairperson title or club officer have the title president/secretary/treasurer in MyLCI

Note: For districts that train zone chairperson or club officers before the new Lion Year begins and these Lions have a title, after July 1st when the title is assigned in MyLCI, the district goals platform will apply the zone chairperson or club officer training to the district leadership development goal because all the programmed criteria has now been met.

Questions

If you have any questions or need assistance with the Manage Training section of Learn, please contact your GAT specialists at gat@lionsclubs.org.

If you have questions about participant or faculty data and how it will be used, please contact the Leadership Development Division at leadershipdevelopment@lionsclubs.org.

For assistance with your Lion Account, please contact My Lion Support at mylionsupport@lionsclubs.org or 630-468-7000.