

2022-2023



LIONS CLUBS INTERNATIONAL  
**LEADERSHIP  
DEVELOPMENT  
INSTITUTES**

*Planning Guide*



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## INTRODUCTION

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The purpose of this *Institute Planning Guide* is to provide the necessary information, tools, and resources to coordinate and facilitate an effective institute. See the *Institute Supplements* for institute specific information.

Lions Clubs International offers the following types of institutes for coordination at the local level:

**Emerging Lions Leadership Institute (ELLI):** Training to prepare Lions for leadership positions at the club level. **Qualified candidates:** Lions in good standing who have successfully served on a club committee and have not yet obtained the level of club president. Club first vice presidents are strongly encouraged to attend *ELLI*.

**Regional Lions Leadership Institute (RLLI):** Training to prepare Lions for leadership positions throughout the organization. **Qualified candidates:** Lions ready to pursue leadership roles within their Lions communities. Club leaders would benefit from attending. The *RLLI* program may be customized to best accommodate the needs of the area.

**Advanced Lions Leadership Institute (ALLI):** Training to prepare Lions for leadership positions at the zone, region, and district levels. **Qualified candidates:** Lions who have completed a successful term as club president but have not yet attained the position of first vice district governor.

**Faculty Development Institute (FDI):** Training to develop and expand the number of skilled Lions faculty available for use in training at the club, district, and multiple district levels. **Qualified candidates:** Lions who have had some experience serving as instructors at local Lions training events, have demonstrated basic instructional skills, and have an interest in further developing those skills.

## HOW TO USE THIS GUIDE

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This guide contains the following information to support and deliver a successful institute:

- Preparation Checklist – List of necessary steps to prepare, deliver and report an institute.
- Appendix – Resources that can be customized to meet specific needs of an institute:
  - *Request for Proposal (RFP)*
  - *Curriculum Acceptance Form*
  - *Welcome Letters*
  - *Contact and Lodging Form*
  - *Housekeeping Overview*

The *Institute Planning Guide* is subject to change and does not account for all local variances and timelines. For any questions during the preparation process, please contact [institutes@lionsclubs.org](mailto:institutes@lionsclubs.org).



## PREPARATION CHECKLIST

Proper preparation is key to hosting a successful institute. Below are the steps to prepare, deliver and report the institute. Details on each step are available throughout the *Institute Planning Guide*.

X	Pre-Institute: 2-4 months prior to institute	Timeframe
	Select and confirm training dates.	3-4 months prior to institute
	Select training location/venue. (Appendix A)	3-4 months prior to institute
	Identify faculty and confirm availability. <b>Note:</b> Each classroom should have a minimum of two (2) faculty. See Faculty Guidelines for faculty selection criteria on page 7.	3-4 months prior to institute
	Submit the appropriate application (if not already submitted). <ul style="list-style-type: none"> <li>Leadership Development Institute Grant Program Application (request for funds) found on the LCI website.</li> <li>Leadership Development Local Institute Program Application (locally funded) by email to <a href="mailto:institutes@lionsclubs.org">institutes@lionsclubs.org</a> to request the application.</li> </ul> <b>Note:</b> Please ensure the date of the institute is a minimum of 3-4 months after the date your completed application is submitted. This will guarantee that all materials are provided to the Institute Coordinator with enough time to properly prepare for the selected institute.	3-4 months prior to institute
	Send deposit to reserve location/venue. <b>Note:</b> Consider hotel contract guidelines before submitting the deposit prior to receiving application approval from Lions Clubs International.	As required by venue
	Send an email to faculty with the <i>Topic Selection Sheet</i> , <i>Curriculum Acceptance Form</i> , and <i>Institute Sample Schedule</i> attached. <b>Note:</b> Each faculty <u>must</u> complete and return the <i>Topic Selection Sheet</i> and <i>Curriculum Acceptance Form</i> . (Appendix B)	3-4 months prior to institute
	Coordinate session topics and create Faculty/Assignment Schedule, see page 11 for details.	3-4 months prior to training
	Send institute <i>Instructor Guide (IG)</i> to each faculty only if <i>Curriculum Acceptance Form</i> is received. See Institute Materials (Curriculum) on page 9.	3-4 months prior to institute
	Communicate institute dates/locations and invite Lions to attend.	3-4 months prior to institute
	Procure Audio/Visual vendor for purpose of participant recordings ( <i>FDI</i> only). See <i>Institute Supplements</i> for instruction.	3-4 months prior to institute
	Send anticipated participant list to Lions Clubs International.	1-2 months prior to institute
	Conduct faculty preparation call (optional). <ul style="list-style-type: none"> <li>Review institute schedule, confirm session assignments, review institute logistics.</li> </ul>	4-6 weeks prior to institute
	Confirm final list of participants and send to faculty.	4-6 weeks prior to institute
	Identify any special accommodations/needs for participants and faculty and review the logistics of the institute to consider modifications that may be necessary (visual/hearing impairment, handicap accessibility, etc.).	4-6 weeks prior to institute
	Send each participant a personalized <i>Participant Confirmation Letter</i> with information for the institute pre-assignments. See Participant Pre-Assignments on page 11 and <i>Institute Supplements</i> for institute specific instructions.	4-6 weeks prior to institute
	Print all participant materials such as: <ul style="list-style-type: none"> <li>Name badges, table tents, participant guides, handouts.</li> </ul>	4-6 weeks prior to institute



## PREPARATION CHECKLIST (continued)

X	Pre-Institute: 1 month prior to institute	Timeframe
	Obtain supplies needed to deliver the institute (Appendix C).	3 weeks prior to institute
	Prepare USB Flash Drives for participant recordings ( <i>FDI</i> only). See <i>Institute Supplements</i> for instruction.	3 weeks prior to institute
	Create and print <i>Welcome Letters</i> for faculty and participants (Appendix D).	1 week prior to institute
	Download, personalize and print institute completion certificates.	1 week prior to institute

X	Onsite Logistics	Timeframe
	Tour location/venue <ul style="list-style-type: none"> <li>Meet key location/venue personnel and review institute logistics</li> <li>Confirm and review training room location</li> <li>Confirm location/venue rooming lists (if necessary)</li> <li>Review schedule and confirm final details such as training room set up, technology needs, and food/beverage requirements</li> </ul>	1-2 days before institute
	Prepare <i>Participant Welcome Packet</i> for distribution at arrival: <ul style="list-style-type: none"> <li><i>Welcome Letter</i></li> <li><i>Contact and Lodging Form</i></li> <li>Name Badges</li> </ul>	1-2 days before institute
	Prepare classroom(s) <i>*subject to availability</i> <ul style="list-style-type: none"> <li>Load PowerPoints on the computer/laptop (Faculty Presentations)</li> <li>Participant Manuals</li> <li>Institute Schedule</li> <li>Meeting room supplies (Faculty Room)</li> <li>Classroom supplies</li> </ul>	1-2 days before institute
	Conduct faculty meeting (Appendix F).	Day before institute
	Ensure faculty share <i>Housekeeping Overview</i> with participants (Appendix G).	Welcome Session
	<i>Daily Attendance Sheet</i> - each participant must sign in daily (Appendix H).	Daily
	Evaluations – See <i>Institute Supplements</i> for information and guidelines regarding daily distribution to participants.	Daily
	Present personalized institute certificates and completion pins to participants (pins not applicable to RLLI and FDI).	Closing Session

X	Post Institute	Timeframe
	Report institute in <i>Learn</i> – see information and guidelines regarding reporting on page 13.	Within 14 days post institute
	Submit required post institute documents to the Leadership Development Division. <b>Note:</b> The institute will not be recognized as an official institute until the required institute documents are reviewed by the Leadership Development Division. A list of required documents will be sent to the Institute Coordinator upon approval of the institute application.	Within 14 days post institute
	Provide final participant list ( <i>Daily Attendance Sheet</i> with signatures) to Lions Clubs International.	Within 14 days post institute
	Send Thank You letters (optional).	Within 14 days post institute



## THE ROLE OF THE INSTITUTE COORDINATOR

The Institute Coordinator is vital to the successful delivery of the institute. The role of the Institute Coordinator requires a strong commitment, dedication, and willingness to support Lions along their leadership pathway. Due to unique responsibilities, this Lion should **not** be a member of the faculty team.

Below is an overview of responsibilities and deliverables for the Institute Coordinator. See the *Preparation Checklist* for details.

Pre-Institute
Location/Venue Logistics <ul style="list-style-type: none"> <li>Coordinate and distribute <i>Request for Proposal (RFP)</i> for location/venue solicitation</li> </ul>
Institute Application Process <ul style="list-style-type: none"> <li>Submit applications 3-4 months prior to the date of the institute</li> </ul>
Faculty Preparation <ul style="list-style-type: none"> <li>Confirm eligibility and availability</li> <li>Provide <i>Instructor Guide (IG)</i> to faculty</li> </ul>
Participant Preparation <ul style="list-style-type: none"> <li>Confirmation communications</li> <li>Assign pre-assignments</li> </ul>
Institute Promotion <ul style="list-style-type: none"> <li>Promote institute in <i>Learn</i> and throughout multiple district and district newsletters</li> </ul>
Onsite
<i>Participant Welcome Packet</i> <ul style="list-style-type: none"> <li>Prepare for delivery upon arrival</li> </ul>
Faculty Preparation and Debrief Sessions <ul style="list-style-type: none"> <li>Review curriculum and institute schedule</li> <li>Conduct daily institute debrief sessions with faculty</li> </ul>
Classroom Set-up <ul style="list-style-type: none"> <li>Organize participant and session materials</li> <li>Verify audio/visual and technology needs</li> </ul>
Logistics of the institute <ul style="list-style-type: none"> <li>Oversee daily operations of the institute</li> </ul>
Post Institute
<i>Learn</i> <ul style="list-style-type: none"> <li>Report the institute for acknowledgement by Lions Clubs International</li> </ul>
Post institute documentation <ul style="list-style-type: none"> <li>Complete the <i>Institute Final Summary</i></li> <li>Provide final participant list to Lions Clubs International</li> </ul>



## THE ROLE OF THE INSTITUTE FACULTY

Faculty will serve as a trainer and interactive instructor. Below are requirements that faculty conducting this training should be able to perform. While it is not imperative that the faculty are experts in each area, it is important that they be proficient in the skills listed below:

- Ability to engage participants in an interactive learning environment by conducting question and answer segments, facilitating meaningful discussions in large and small group settings, and facilitating group activities
- Management of participant behavior
- Management of the training environment
- Use of PowerPoint presentation and an LCD projector

Each classroom should have a minimum of two (2) faculty. **At least half of the faculty in each classroom must be a Faculty Development Institute (FDI) graduate or Lions Certified Instructor Program (LCIP) certified.** All faculty members should have prior facilitation or training experiences.

Pre-Institute
Verify availability/accept invitation to serve as faculty
Submit <i>Topic Selection Sheet</i> and <i>Curriculum Acceptance Form</i>
Receive the <i>Instructor Guide (IG)</i> and identify the sessions for preparation

Onsite
Attend faculty preparation day
Facilitate daily sessions and support other faculty
Participate in daily debrief of curriculum and sessions with faculty team

Post Institute
Complete and submit faculty questionnaire
Discuss any additional responsibilities with Institute Coordinator



# INSTITUTE SAMPLE SCHEDULE

The following format is a sample schedule for an institute. See *Institute Supplements* for institute specific sessions, timelines, and details.

## Institute Sample Schedule

Arrival	Day 1	Day 2	Day 3
Faculty Prep Day	Breakfast	Breakfast	Breakfast
	Opening Session	Sessions	Sessions
	Break	Break	Break
	Sessions	Sessions (Continued)	Sessions (Continued)
Participant Arrival Day	Lunch	Lunch	Lunch
	Sessions (Continued)	Sessions (Continued)	Sessions (Continued)
			Closing / Evaluations
	Break	Break	Departure
	Sessions (Continued)	Sessions (Continued)	
	Dinner	Appreciation Dinner	





## TOPIC SELECTION SHEET

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The faculty *Topic Selection Sheet* is specific to each institute type and lists the sessions, which are designed to accomplish the objectives of the institute. It is encouraged that faculty share their preference for the session topics they wish to prepare and facilitate.

Email the *Topic Selection Sheet* to faculty, with a copy of the *Curriculum Acceptance Form* and *Institute Sample Schedule*.

Request that the faculty indicate topic preferences and return their selections to the Institute Coordinator. The Institute Coordinator will review the topic preferences and make the final faculty assignments.

See *Institute Supplements* for institute specific topic selection sheets and sample schedules.

## INSTITUTE MATERIALS (CURRICULUM)

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### Common material abbreviations

IG = Instructor Guide

PM = Participant Manual

PPT = PowerPoint slides

### Access to the institute curriculum

Institute Coordinators will receive a link to the institute materials (curriculum) at time of the application approval.

- Access the secure institute curriculum files using the link provided upon application approval.
- Provide the *Instructor Guide (IG)* to the faculty so they may prepare for the institute (printed or electronically).

**Note:** Curriculum content is the proprietary learning content of Lions Clubs International and should be used for approved Lions training only. Please do not share the link/content for use outside this effort.

Institute materials are available in all official Lions Clubs International languages. If the institute is presented in a non-official language of Lions Clubs International, translation of all material is the responsibility of the organizing multiple district, district or undistricted country.

### Material (Curriculum) Preparation

Upon accessing the secure institute curriculum files, take time to review the contents of each folder to familiarize yourself with the sessions and resources provided.

- Each folder contains a series of session folders. Download the contents for each session including the *Instructor Guide (IG)*, *Participant Manual (PM)*, and handouts.
- Print the appropriate number of participant and faculty materials.

It is not required to print any participant materials in color.

See *Institute Supplements* for institute specific information.






## HOW TO USE THE INSTRUCTOR GUIDE (IG)

The *Instructor Guide (IG)* is designed to support faculty, providing a training overview for each session of the curriculum, complete with facilitation notes and requirements for delivery.

Helpful hints and guidelines are included in the *Instructor Guide (IG)* such as recommended speaking notes, step-by-step instructions for interactive activities, recommendations for timing of each session, and samples of handouts used in each session.

The following image is a sample page from the *Instructor Guide (IG)*, identifying key components of a session.

MODULE 1: Identifying Needs		
APPROX TIME	METHOD	CONTENT
30 Minutes Total	Total Module Time	
5 minutes	 	<p><b>DISCUSSION: Maslow's Hierarchy of Human Needs</b></p> <ol style="list-style-type: none"> <li>1. Direct participants to turn to Maslow's Hierarchy of Needs on page 1 of the Participant Manual.</li> </ol> <p><b>Leader Note:</b> Participants were required to read about Maslow's Hierarchy in the pre-institute assignment, so you should not need to present it at this point.</p> <ol style="list-style-type: none"> <li>2. <b>Ask:</b> "Which levels of need do you think a good Lions club environment can address to help support the motivation of its members?" Responses will vary and may include needs in levels 2 through 5.</li> </ol>
Activity Time	Method Symbols	<ol style="list-style-type: none"> <li>3. <b>Explain</b> that the important message to take from Maslow is that the easier we learn about the needs of our fellow Lions, the easier it will be to provide an environment where those needs can be met.</li> <li>4. <b>Ask:</b> "How do we go about determining the needs of our fellow club members?" Responses may include: <ul style="list-style-type: none"> <li>• We listen to what they talk about</li> <li>• We watch the things they do</li> <li>• We talk with them and ask them questions</li> <li>• We survey them frequently</li> </ul> </li> <li>5. <b>Display Slide 4: Listen, Look, Ask</b></li> <li>6. <b>Explain</b> that by knowing our members as individuals and understanding their values and needs, we are better able to provide <b>motivation stimulators</b> and eliminate <b>motivation obstacles</b>.</li> <li>7. <b>Ask:</b> "Who can share a personal need and tell us about a stimulator in your club that motivates you or an obstacle in your club that inhibits your motivation?" Allow several participants to contribute.</li> </ol> <p>Remember that people are self-motivated, we can only provide the environment that allows them to fulfill their needs.</p>
	 Slide 4	Instructor Notes

For each session, faculty will need access to the following audio/visual equipment:

- Computer with PowerPoint (PowerPoint 2007 version or later)
- LCD projector and screen for provided PowerPoint presentation
- Flipchart and markers
- Wireless mouse/wireless presenter/laser pointer (optional)
- Recommended Supply List (Appendix C)

## PARTICIPANT PRE-ASSIGNMENTS

Pre-assignments can consist of both individual and group work preparation in advance of an institute. Approximately 4-6 weeks prior to the start of the institute, send each participant a *Participant Confirmation Letter*. The *Participant Confirmation Letter* will provide the participants with the logistics of the institute and the **required** pre-assignments.

See *Institute Supplements* for institute specific information.

## FACULTY/ASSIGNMENT SCHEDULE

Upon return of the *Topic Selection Sheet*, the Institute Coordinator will assign each topic session to a member of the faculty. It is important to consider desired topics for each faculty, trying to accommodate some of the topic selections but knowing it may be impossible to honor all preferences. When creating the Faculty/Assignment Schedule, keep in mind it is essential to balance the faculty each day to provide variety to the participants, as well as equal time to the faculty in front of the classroom.

### Faculty/Assignment Schedule

Arrival	Day 1	Day 2	Day 3
Faculty Prep Day	Breakfast	Breakfast	Breakfast
	Opening Session [Faculty Name]	Sessions [Faculty Name]	Sessions [Faculty Name]
	Break	Break	Break
	Sessions [Faculty Name]	Sessions (Continued) [Faculty Name]	Sessions (Continued) [Faculty Name]
Participant Arrival Day	Lunch	Lunch	Lunch
	Sessions (Continued) [Faculty Name]	Sessions (Continued) [Faculty Name]	Sessions (Continued) [Faculty Name]
	Break	Break	Departure
	Sessions (Continued) [Faculty Name]	Sessions (Continued) [Faculty Name]	
	Dinner	Appreciation Dinner	
		Closing / Evaluations [Faculty Name]	



## TRAINING ROOM SET-UP

Before the institute begins, it is important to think about the set-up of the room(s) in which the institute sessions will be conducted. The following table will assist in understanding participant and classroom capacities.

	Maximum Participants	Minimum Participants (per classroom)	Maximum Participants (per classroom)	Maximum Classrooms	Maximum Faculty (per classroom)
RLLI	100	20	25	4	3
ELLI	75	20	25	3	3
ALLI	75	20	25	3	3
FDI	20	10	20	1	2

\*\*Curriculum is designed to accommodate the maximum participants per classroom as stated above. Any requests outside of these guidelines will be evaluated on a case-by-case basis.

**Faculty Team:** Each classroom should have two – three (2-3) faculty and meet the following criteria:

- **For ELLI or RLLI** – At least half of the faculty in each classroom must be a Faculty Development Institute (FDI) graduate or be certified through the Lions Certified Instructor Program (LCIP).
- **For ALLI** – All faculty must be a Faculty Development Institute (FDI) graduate or be certified through the Lions Certified Instructor Program (LCIP).
- **For FDI** - All faculty must be certified through the Lions Certified Instructor Program (LCIP).

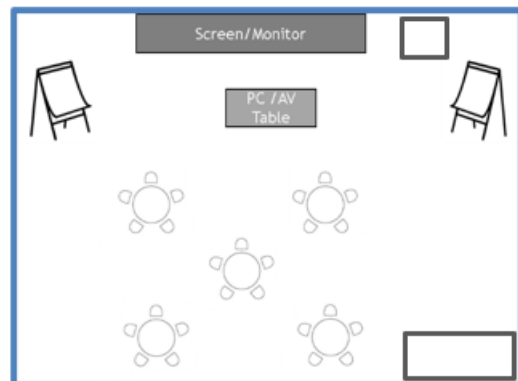
No more than five (5) participants should be at each table. Consider the following as the room(s) are selected:

- **Culture and norms:** What cultural norms may affect the set-up of the tables and chairs? Do the participants expect a certain room layout?
- **Size of the classroom:** Once the approximate dimensions and layout of the classroom are confirmed, it is sometimes helpful to draw a diagram of the room set-up. This technique may confirm decisions regarding the activities, materials, and equipment.
- **Activities involved in the training:** Do any activities require a specific amount of space and collaboration, and if so, how might the room set-up need to be adjusted?

Due to the interactive and discussion-based nature of the sessions, the seating arrangement is suggested.

Advantages of using the suggested seating arrangement are below:

- Ideal for participants working in small groups
- Easy for trainer to interact with small groups
- Provides opportunity for participant involvement
- Provides freedom of movement



**Suggested Seating Arrangement (Group size = 25)**

## EVALUATIONS

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Evaluations are a significant part of any training program. Data collected from evaluations can provide an important insight into the effectiveness of content, materials, training format, instructors, and the overall success of the training effort.

Participants are encouraged to complete the evaluations honestly and with constructive feedback so Lions Clubs International can compile the necessary data to improve and grow the institutes for future leadership pathways.

See *Institute Supplements* for institute specific information.

## POST INSTITUTE DOCUMENTATION

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At the close of the institute, the Institute Coordinator is accountable for submission of required post institute documents. Institutes will not be recognized as an official institute until the required documents are received and reviewed by the Leadership Development Division. A list of the required documents will be included in the application approval email sent to the Institute Coordinator upon approval of the institute application.

Please contact the Leadership Development Division with any questions during the documentation process at [institutes@lionsclubs.org](mailto:institutes@lionsclubs.org).



## APPENDIX

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The following resources may be customized to meet specific needs and utilized during the planning phase of the institute.

The *Institute Planning Guide* is subject to change and does not account for all local variances and timelines. For any questions during the preparation process, please contact [institutes@lionsclubs.org](mailto:institutes@lionsclubs.org).



## APPENDIX A: REQUEST FOR PROPOSAL (RFP)

**Note:** This is a sample *Request for Proposal (RFP)*. Use this document to provide possible venues with the requirements for your institute as appropriate.

### Request for Proposal

Lions Clubs International is the world’s largest service club organization. Our mission is to empower volunteers to serve their communities, meet humanitarian needs, encourage peace, and promote international understanding through Lions Clubs. More information on our organization can be found on our website, [www.lionsclubs.org](http://www.lionsclubs.org).

Event: [Institute Name]

Leadership Development Institute Programs focus on supporting Lions along their leadership pathway. The [Institute Name] is a Leadership Development Program for Lions Clubs International members who wish to expand their knowledge, enhance their leadership skills, and further develop management skills for future leadership positions within the association.

This institute includes [# of] participants, [# of] volunteer faculty and an Institute Coordinator.

Dates of the Event: [Date] (include setup and pre-institute meeting dates, if necessary)

Institute Coordinator: [Name and phone number]

Room Block: for [# of participants] persons, the following guest rooms are anticipated.

Date	[Day] [Date]	[Day] [Date]	[Day] [Date]	[Day] [Date]	[Day] [Date]
Single rooms – King	#	#	#	#	#
Double rooms – 2 beds	#	#	#	#	#

A Rooming List will be provided. Please indicate applicable taxes in your quote. Checkout will be on [Date] for [# of] participants, however we request that the group rate be extended one day before and one day after as it may be necessary for participants to arrive the day before or stay an extra night due to flight schedules.

The following group meal functions and coffee breaks will be required. Breaks should be in a separate area, but convenient to all meeting rooms. Meals should be served in a dining area/room separate from the function rooms. We will have an appreciation dinner on [Date]. This will require a private room, preferably with AV connectivity. A guaranteed count will be provided 48 hours before the meeting commences.

	[Day] [Date]	[Day] [Date]	[Day] [Date]	[Day] [Date]
Breakfast	#	#	#	#
Break – A.M.	#	#	#	#
Lunch	#	#	#	#
Break – P.M.	#	#	#	#
Dinner	#	#	#	#



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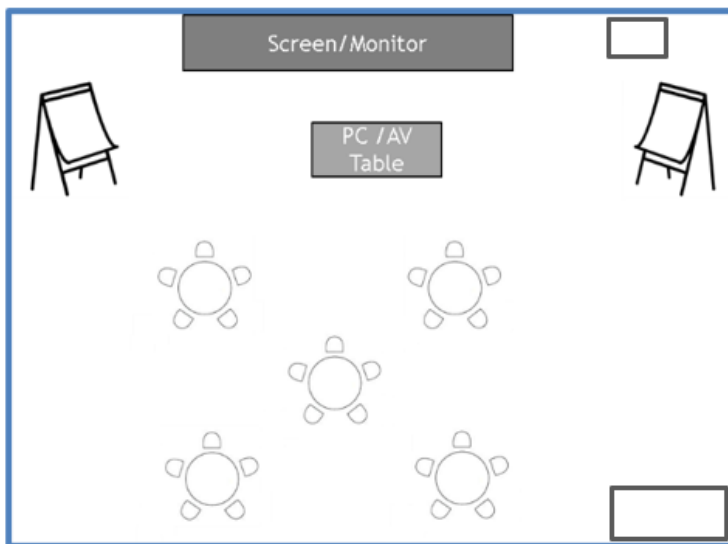
## APPENDIX A: REQUEST FOR PROPOSAL (RFP)

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### Meeting Room/Classroom Requirements:

- Each room must allow twelve (12) feet from the front of the room to the first row of tables for audio-visual presentations.
- Small table for materials at the front of the meeting room.
- One (1) rectangle table with 2-3 chairs at the back of the room.
- Water on each table, refreshed during breaks.
- No ashtrays in the rooms.
- One (1) large trash bin.

### Meeting Room Diagram (Sample configuration for a group size of 25):



Due to the interactive and discussion-based nature of the sessions, the above seating arrangement is suggested. Advantages of using the suggested seating arrangement are below.

- Ideal for participants working in small groups
- Easy for trainer to interact with small groups
- Provides opportunity for participant involvement
- Provides freedom of movement



## APPENDIX A: REQUEST FOR PROPOSAL (RFP)

Meeting Room/Classroom Specifics:

Example: Based on 25 participants, 4 faculty and 1 Institute Coordinator

Function Space	Number/Size of Rooms	Room Set-Up	Days Required	Equipment Required
<b>Faculty Room</b>	1 room for 6 persons. Should accommodate faculty and Institute Coordinator.	Double-width conference table.	[Date] [Time] through [Date] [Time], with 24-hour accessibility	<ul style="list-style-type: none"> <li>One (1) flip chart stand with paper and markers</li> </ul>
<b>Meeting Rooms: Approximately 1,000 square feet (90 square meters) each</b>	[# of] rooms for 25 persons each	Rounds of 5 participants per table (front-facing crescent seating).	[Date] [Time] through [Date] [Time], with 24-hour accessibility	For each classroom: <ul style="list-style-type: none"> <li>Two (2) flip chart stands with paper and markers</li> <li>One (1) Lavalier microphone</li> <li>One (1) cordless microphone (optional)</li> <li>Laptop computer with DVD drive and slide advancer, projector, and large screen</li> <li>Sound system (for microphones and to play DVDs)</li> </ul>
<b>General Session Room (only necessary if there are multiple classrooms)</b>	1 room for 55 (if the two 25-person meeting rooms can be joined, this can be used for the general session room). Should accommodate participants, faculty, and Institute Coordinator.	Rounds of 5 plus 1 rectangular table for faculty and Institute Coordinator.	[Date] [Time] and [Date] [Time]	<ul style="list-style-type: none"> <li>Two (2) Flip chart stands with paper and markers</li> <li>One (1) Lavalier microphone (optional)</li> <li>One (1) Cordless microphone</li> </ul>

Considerations:

- Complimentary Wi-Fi for the faculty and Institute Coordinator.
- Function space (faculty/meeting/general session rooms) provided at no charge.
- Conference equipment provided at no charge (e.g. audio-visual equipment).
- Complimentary water, paper, pencil, and candies at each table.

Sales Packet: Please enclose one (1) sales packet, to include:

- Current food and beverage/banquet menus including prices, taxes, and other fees (e.g. service charges, gratuities).
- One brochure detailing facilities and guest services. The brochure should include photos of the lodging rooms, meeting rooms, and dining area.
- Current public dining room menus.

If you would like to be considered, please return a proposal to [Institute Coordinator] at [Email] by [Date]. Please be sure to include all charges related to the quote.



## APPENDIX B: CURRICULUM ACCEPTANCE FORM

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Curriculum content is the proprietary learning content of Lions Clubs International and should be used for Lions training only.

Email this form to all faculty prior to sharing the *Instructor Guide (IG)*. The signed form must be returned to the Institute Coordinator before curriculum is shared. Update the form with the correct institute information (location, date, etc.)

### CURRICULUM ACCEPTANCE FORM

[Institute Name]

Thank you for accepting our invitation to serve as an instructor for the [Institute Name] in [Location].

The [Institute Name] is dedicated to Lions members who wish to expand their knowledge, enhance their leadership skills, and further develop management skills for future leadership positions within the association.

We know that your personal experiences and presentation styles may offer some opportunities to expand on the topics and enhance the learning environment. We welcome your suggestions and require that any changes you would like to implement within the board-approved curriculum be reviewed and accepted in advance by the Instructional Design Department.

Due to the exclusive use of this curriculum at the [Institute Name], it is intended for your personal use in preparation of your role as faculty at the institute taking place in [Location] on [Dates]. We ask that you do not use this curriculum outside of this institute for which you are serving as a facilitator.

Please acknowledge your acceptance of these requirements by signing your name and emailing this document back to [Institute Coordinator] at [Email] by [Date].

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Faculty Signature

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Faculty Name, Printed

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Membership ID#



## APPENDIX C: SUPPLY LIST

Below is a list of supplies highly recommended by Lions Clubs International. Not everything listed is required or may be used at your institute – please review the *Instructor Guide (IG)* for all activities planned and adjust, as necessary. The quantities may vary based on participant count.

### Institute Supplies - Required

X	Item	Quantity	Unit of Measurement
	Name Badges and Lanyards	1	Per person – faculty and participants
	Table Tent Cards	1	Per person – faculty and participants
	Flip Chart Paper (may be provided by hotel/venue)	2	Per classroom
	Mounting wall putty or masking tape roll (used to attach Flip Chart to walls)	1	Box of putty or roll of tape per classroom *Consult hotel/venue for adhesive permissions and guidelines
	Flip Chart Markers	1	Set per table
	Pencils	1	Per person (replenish as needed)
	Pens (may be provided by hotel/venue)	1	Per person (replenish as needed)
	Medium Post-It Notes	2	Pads per table

### Institute Supplies – Optional

X	Item	Quantity	Unit of Measurement
	Small index cards	1	Box
	Large index cards	1	Box
	Glue sticks	1	Per table
	Highlighters	1	Per faculty
	White out liquid	1	Bottle
	Scotch tape	1	Rolls
	Stapler	1	Stapler
	Box of staples	1	Box
	Staple remover	1	Remover
	Fine point black marker (Sharpie)	3	Marker
	Scissors (medium)	1	Per table
	Rubber bands	1	Package
	Lions emblems (Order from Lion International Club Supplies)	Optional	3 per classroom

Additional supplies specific to each institute (printed materials and handouts) can be found in the *Institute Supplements*.



## APPENDIX D: WELCOME LETTERS

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*Welcome Letters* are prepared and delivered upon arrival at the institute location/venue. These letters should welcome faculty and participants to the institute and provide information on where and when to meet. Edit the below sample letters as needed.

### Faculty \*delivered upon check-in at the venue

Welcome to the [Institute Name]  
[Dates]  
[Location]

Welcome to [Location] and the [Institute Name]. I hope you all had a safe journey here.

This evening we will meet in the lobby at [Location] for dinner at [Time]. You are kindly requested to join us as we come together as a faculty team for a casual dinner.

Tomorrow morning, we will meet at [Time] am/pm in the [Location]. This will be our faculty room for the duration of the institute.

I again welcome you to [Location] and look forward to seeing you this evening as well as tomorrow morning.

Sincerely,

Institute Coordinator [Name]

### Participant \*included in Welcome Institute Packet

Welcome to the [Institute Name]  
[Dates]  
[Location]

Welcome to [Location] and the [Institute Name]!

We are excited to welcome you to this institute and we appreciate your commitment to this program.

This institute will begin at [Time] in the [Location/Name of Meeting Room]. Breakfast will be provided beginning at [Time] in the [Location/Meal Room or Restaurant].

[Provide meal instructions. For example: breakfast or dinner, time, and location.]

To facilitate your participation, this packet contains the following:

- Name Badge – please wear this throughout the institute (lanyard included).
- *Contact and Lodging Form* – please complete this form and bring to Opening Session.

The rest of your institute materials will be provided in the classroom.

I again welcome all of you to this valuable training event that will prepare you to take on further responsibility and further develop your leadership pathway.

Sincerely,

Institute Coordinator [Name]



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## APPENDIX E: CONTACT AND LODGING FORM

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The *Contact and Lodging Form* is prepared with the participant *Welcome Packet*. This form is to be completed by the participants and will provide necessary information to the Institute Coordinator for the duration of the institute. This form contains personal information and should be destroyed at the conclusion of the institute.

[Name of Institute]  
Contact and Lodging Form  
[Location]  
[Dates of the Event]

**PLEASE COMPLETE THIS DOCUMENT AND RETURN TO YOUR FACULTY TOMORROW MORNING!**

**1) Personal Information:**

**Name:**

**Member Number:**

**District:**

**Club Name:**

**Email:**

Emergency Contact Information:

Name: \_\_\_\_\_ Phone: \_\_\_\_\_

**2) Departure Details:**

Departure Date: \_\_\_\_\_

Estimated Hotel Departure Time (this is not the hotel check out time): \_\_\_\_\_

**3) Appreciation Dinner:**

You may bring one (1) guest to the Appreciation Dinner at a personal expense of \$ \_\_\_\_\_. This amount will be charged to your room and is to be paid upon departure.

**Will you be bringing a guest? (please mark one) Yes  No**

Thank you!

Signature: \_\_\_\_\_

Hotel Room Number: \_\_\_\_\_



## APPENDIX F: AGENDA FOR FACULTY MEETING

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This sample agenda contains recommended items to discuss with the faculty during the onsite Faculty Preparation Day prior to the start of the institute. Adjust as necessary based on the needs of the institute.

[Institute Name]  
Faculty Meeting

- Introductions
- Housekeeping
  - Faculty Contact Information (Phone and Room Number)
  - Location/Venue (take a tour to see classrooms and the locations of meals/breaks)
  - Meals and Breaks
  - Attendance/Absences (Reference *Daily Attendance Sheet*)
  - Emergencies
  - Dress Code (Business = faculty, Business casual = participants)
  - Expense Reimbursement (if applicable)
  - Audio/Visual Instruction (as needed)
- Curriculum (review each session and ensure faculty have no questions on curriculum/activities)
  - Confirm session assignments
- Program Components
  - Institute Schedule
  - Participant *Welcome Packets*
  - Daily Faculty Debriefs
  - Appreciation Dinner
  - Parking Lot (Explain what a 'Parking Lot' is – a method of collecting questions and answering at the end of the session)
  - Participant Evaluations
- Lunch
- Questions
- Faculty Preparation – faculty should prepare their classrooms (supplies, tent cards, etc.), test A/V, and PowerPoints



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## APPENDIX G: HOUSEKEEPING OVERVIEW

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These are suggested items to include in the *Housekeeping Overview*, please adjust as necessary based on the needs of the institute. A copy of this document should be provided to each faculty.

### Housekeeping Overview

1. Please follow the institute schedule which lists all session start/end times and locations.
2. Meal times and locations are also listed on the institute schedule. Lunches and dinners are not optional. All participants must attend as this is an important time for sharing ideas, socializing, and networking. Meals that are covered begin with breakfast [Date] through lunch on last day of institute [Date].
3. Appreciation Dinner: spouses or other guests are invited only to the Appreciation Dinner on [Date]. This will be charged as a personal expense to the participants room. On the *Contact and Lodging Form*, please indicate if you are bringing a guest.
4. **BE ON TIME** to all sessions and meals.
5. Wear name badges always. This is important for faculty, your fellow participants, and the venue.
6. Put your name on the cover of your manual. Take this and all other institute materials with you at the end of the day **EXCEPT** for your tent cards. Please leave those on the tables each night.
7. Attendance sheets need to be signed each day. Those not attending all sessions will be responsible for expenses for the duration of the institute.
8. Dress code is business casual every day. Business attire for the Appreciation Dinner is suggested though not required.
9. Explain the use of a "Parking Lot" in the classroom.
10. Participants with visual or hearing impairments should advise faculty so that accommodations may be made.
11. **OPTIONAL!!!** Participants with personal medical needs may elect to share information for emergency use only. Confidential envelopes will be provided and sealed for privacy. Envelopes will be returned to the participant at the conclusion of the institute.
12. Evaluations are delivered electronically to the participants at the end of each institute day to the email they provided.
13. No videotaping or recording. The Institute Coordinator may take pictures during the institute.
14. No laptops or tablets in the classrooms during all sessions. (Faculty discretion)
15. Cell phones must remain off or on silent during all sessions. (Faculty discretion)
16. If you are not feeling well or have an emergency, advise the Institute Coordinator directly.
17. **EMERGENCY EXITS** are located [Location].
18. Toilets are located [Location].
19. Business Center: [Location]
20. Wi-Fi: [Location]
21. Smoking: Outside only.
22. Problems with lodging accommodations, please see the Institute Coordinator.
23. Incidentals such as alcohol, movies, meals, phone calls, room service, etc. will be paid by the participant.
24. If you have any questions about when the hotel expects you to leave or which nights will be covered by the institute budget, please talk to the Institute Coordinator today. **DO NOT WAIT UNTIL** the last day of the institute.
25. Check out is at [Time]. You must check out before classes on the last day of the institute. Late check out requests must be arranged directly with the hotel. Luggage storage will be handled as follows [Luggage instructions as arranged with location/venue]. It is recommended that luggage is not kept at the back of the classroom if possible.



# APPENDIX H: DAILY ATTENDANCE SHEET

This is a sample of the *Daily Attendance Sheet* for reference only. The actual *Daily Attendance Sheet* will be emailed to the Institute Coordinator upon approval of the institute application.



## Leadership Development Daily Attendance Sheet (Information below will be reported to Lions Clubs INTERNATIONAL. \*)

Multiple District/Single District/District # \_\_\_\_\_ Country: \_\_\_\_\_ Date of Institute: \_\_\_\_\_

Location of Institute: \_\_\_\_\_ Type of Institute: \_\_\_\_\_

If the participant list is missing membership numbers and/or signatures, the list will not be accepted.					My signature below confirms my attendance at the above institute program and my photo consent. *			
	Name	Title	Club Number	Member Number	Photo/Video Consent* (signature)	Day 1 (signature)	Day 2 (initial)	Day 3 (initial)
1								
2								
3								
4								
5								
6								
7								
8								
9								
10								

**\*Photo Consent:** By signing this form, you authorize that any photographs/videos taken of you at this institute can be used by Lions Clubs International for the purpose of printed, digital, video, or other mediums for the purposes of promotion and publicity for Lions Clubs International. Those images shall be the property of LIONS CLUBS INTERNATIONAL for all use.

**\*Reporting:** The information shared will be recorded to ensure individual Leos and Lions are given credit for attending training events. If you have any questions on how this information will be used, contact Leadership Development ([leadershipdevelopment@lionsclubs.org](mailto:leadershipdevelopment@lionsclubs.org)).





# APPENDIX I: INSTITUTE FINAL SUMMARY

The Institute Final Summary is to provide the concluding details and information such as recommendations for program improvements, topic suggestions, feedback on the technology and logistics of the institute and positive or negative reviews to Lions Clubs International.



## LEADERSHIP DEVELOPMENT INSTITUTE FINAL SUMMARY

The *Leadership Development Institute Final Summary* provides concluding details and information such as recommendations for program improvements, topic suggestions, feedback on the technology and logistics of the institute and overall constructive reviews to Lions Clubs International.

Institute Program Details	
Institute Coordinator Name	
Type of Institute	
Dates of Institute	
Venue (City and Country)	
Number of Participants – Attended	
District Representation	

Faculty (You may copy this sheet if you have more than four (4) faculty members.)				
	Print Name	Title	Member Number	Email
1.				
2.				
3.				
4.				

Institute Final Summary
Please provide a summary of the participant and faculty experiences during the institute. Highlight constructive feedback that impacts and/or would improve the participant and faculty experience while at the institutes. Include feedback related to the institute logistics and/or technology used. Also, provide details of incidents related to the participants and/or faculty that should be documented. Lions Clubs International staff will review this summary and incorporate this feedback to improve the current Leadership Development Institute Program and support processes. Your reporting is critical to the success and development of future programs.

**By signing this form, I understand that this Leadership Development Institute Final Summary becomes a part of Lions Clubs International's official records. My signature confirms that, to the best of my knowledge and belief, all information in the Leadership Development Institute Final Summary is provided and accurate.**

	Print Name	Signature	Date
Institute Coordinator			

