

The LeaderShape® Institute

Planning Timeline

(Please adjust this timeline to meet the planning needs of your campus.)

9-12 months prior to The LeaderShape Institute

- Determine date for your campus-based session and notify LeaderShape
- Reserve a site for your campus-based session and notify LeaderShape
- Determine who on your campus will serve as the Program Coordinator
- Request an contract from LeaderShape, complete and return by designated deadline

8 months prior to The LeaderShape Institute

- Select a Planning Team for your campus
- Determine a budget and secure funding
- Develop a selection process for Cluster Facilitators
- Develop a recruitment process for participants
- Develop a selection process for an On-Site Coordinator(s)
- Identify Guest Leaders

6-7 months prior to The LeaderShape Institute

- Invite potential Cluster Facilitators
- Send LeaderShape information and promotional materials to potential Cluster Facilitators
- Create Cluster Facilitator application in the LeaderShape database (if needed)
- Create On-Site Coordinator application in the LeaderShape database (if needed)

5 months prior to The LeaderShape Institute

- Select On-Site Coordinator(s)
- Create participant application in the LeaderShape database
- Initiate the recruitment process for your students
- Schedule site visit including LeaderShape staff (if hosting a session for the first time)

4 months prior to The LeaderShape Institute

- Invite potential Guest Leaders
 - Continue with the recruitment of participants
 - Select Cluster Facilitators—be sure to select alternates!
 - Confirm Cluster Facilitator information in the LeaderShape database
 - Confirm On-Site Coordinator information in the LeaderShape database

3 months prior to The LeaderShape Institute

- Secure vendor contracts for: t-shirts (if needed), photographer (if needed), transportation, and faculty gifts (if needed)
- Verify site logistics
- Provide site with schedule of week including meals and breaks
- Confirm/verify Team Challenge Course logistics
- Develop a travel plan to get participants and faculty to the site

2 months prior to The LeaderShape Institute

- Hold a meeting with Cluster Facilitators to discuss: expectations, LeaderShape history, outcomes of The LeaderShape Institute, site logistics, and obligations for the session



*A not-for-profit organization
committed to developing young
adults to lead with integrity.*

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- Accept and notify participants
- Send initial numbers of Cluster Facilitators, On-Site Coordinator(s), and participants to LeaderShape for supplies
- Give your On-Site Coordinator(s) the On-Site Coordinator Manual
- Begin meeting with your On-Site Coordinator(s) to discuss expectations and job responsibilities

1 month prior to The LeaderShape Institute

- Finalize Guest Leaders
- Determine a location for Faculty Training
- Hold an orientation meeting for participants to discuss expectations, LeaderShape history, and site logistics

3 weeks prior to The LeaderShape Institute

- Manuals and supplies arrive on campus
- Distribute manuals to Cluster Facilitators and On-Site Coordinators
- Hold a second orientation meeting with Cluster Facilitators
 - Distribute manuals
 - Explain expectations
 - Review logistics
 - Answer any final questions
- Conference call with Lead Facilitators, Program Coordinator, and LeaderShape
- Review On-Site Coordinator To-Do List with your On-Site Coordinator(s)

2 weeks prior to The LeaderShape Institute

- Inventory supplies received—contact LeaderShape if any supplies are missing
- Send packing information to participants
- Confirm departure of bus to site (if needed)
- Purchase any snack foods
- Purchase additional supplies
- Hold participant information meeting
 - Explain Learning Agreement
 - Provide travel details
 - Discuss university policies for the week
- Print the following documents from the LeaderShape website:
 - Name Tags
 - Family Cluster Assignments
 - Rooming Assignments
 - Student Emergency Contact
 - Guest Leader Forum groups (this report not available in the database)
 - Team Challenge Groups (this report not available in the database)

1 week prior to The LeaderShape Institute

- Prepare materials for Faculty Training
- Check all final details
- Arrange for a way to get supplies to the site

The LeaderShape® Institute Planning Timeline, continued

2 days prior to The LeaderShape Institute

- Lead Facilitators arrive

1 day prior to The LeaderShape Institute

- Set out materials for Faculty Training
- Faculty Training
- Take supplies to the site
- Set up the Learning Community room
- Set up the Family Cluster Rooms

During The LeaderShape Institute

- It is not the expectation of LeaderShape that the Program Coordinator be in attendance at all times
- Be available in case of an emergency
- Take notes on your observations throughout the week for feedback to LeaderShape
- Update the LeaderShape database to accurately reflect participants
- Add Family Cluster names to the database
- Print commencement programs

1 week after The LeaderShape Institute

- Return all materials to LeaderShape
- Submit completed evaluations to LeaderShape
- Send thank you notes to:
 - Cluster Facilitators
 - On-Site Coordinator(s)
 - Guest Leaders
 - Corporate/University sponsors
 - Vendors
 - Conference/Retreat Center staff
- Follow-up phone call and evaluation with LeaderShape

