

LIONS QUEST



Lions Quest International Implementation Guidelines



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Implementing Lions Quest Programs

There are five phases involved in the successful implementation of a Lions Quest program. The following is a brief overview of each of these phases. More detailed information and examples are provided in the subsequent pages.

Phase One – Indication of Interest

Phase Two – Curriculum Assessment / Planning for the Future / Signing the Preliminary Memorandum of Agreement

Phase Three – Initial Translation

Phase Four - Conducting the Pilot Workshop

Phase Five – Conducting the Pilot Test / Cultural Adaptation of Materials

Phase Six – Full Implementation / Signing the Official Memorandum of Agreement

Overview

Phase One – Indication of Interest

Phase one begins with an entity contacting the Lions Quest department at the Lions Clubs International Foundation indicating their interest in exploring the implementation of a Lions Quest program in their Multiple District. Preliminary information is shared by Lions Quest and by the entity (“associate”), which may include program descriptions and annual reports. The purpose of this step is to share organizational information and to familiarize all stakeholders with the program(s) and the process involved in their successful implementation.

Phase Two – Curriculum Assessment/Planning for the Future/Signing the Preliminary Memorandum of Agreement

This step is very important and lays the groundwork for successful future program implementation. Lions Quest sends a Review Curriculum for the associate to assess the viability of the program for local implementation.

Before it is decided to fully implement the program, Lions Quest recommends that all stakeholders (Lions, educators, government officials, funders, etc.) assess whether the program will be suitable for local implementation. Often, this initial assessment can be made by allowing experts to review the curricula. In those cases where stakeholders may wish to attend a workshop, they should be encouraged to do so by attending the pilot workshop (see Phase Four below) or a workshop conducted with in the region by another district or multiple district.

If there is general consensus that the program (whether translated from an existing version or adapted) will be suitable to local implementation, the associate will then be asked to share the names of and provide evidence of interest by Lions leadership, funders, or the Ministry of Education such as a letter of endorsement. From there, a Steering Committee should be formed and a three-year plan needs to be developed

by the associate and shared with Lions Quest/LCIF. Consensus on this plan must be reached before continuing to the next step. Also, contact may be needed with the Ministry of Education (or similar national educational authority) to ascertain their support and endorsement.

The next step in Phase Two is to sign a Preliminary Memorandum of Agreement (PMOA). The implementing entity signs the PMOA with the Lions Clubs International Foundation and henceforth is known as an official associate. This is only a preliminary MOA because the organization implementing the program may change as the program evolves. The country/organization may also feel the program is not appropriate and thus discontinue the program at a later stage.

At this point, funding needs to be identified for the pilot workshop and for the ongoing pilot test. This funding can be secured through the Ministry of Education, corporate funders, or other government ministries such as the Ministry of Health.

Phase Three – Initial Translation

A Translation and Adaptation Committee should be formed by the Steering Committee to assess the linguistic and cultural appropriateness of existing versions of Lions Quest materials and the need for the translation of materials. If it is determined that existing versions are not adequate for the pilot, the committee will undertake an initial rough translation of the curricula. The members of the Translation and Adaptation Committee can be appointed or elected. This time-intensive phase is an investment for the next stages of training and ultimately cultural adaptation.

Phase Four – Conducting the Pilot Workshop

The primary purpose of the pilot workshop is to train enough teachers with an LCIF approved Senior Trainer to conduct a classroom pilot test of the program. These pilot teachers will become an integral part of the translation and/or adaptation process, as they will provide valuable feedback used in program modification. During this step, teachers, schools and workshop sites need to be selected, and arrangements need to be made for post-workshop follow-up.

Preparatory work also needs to be done to establish an evaluation team. This evaluation team is usually an outside organization such as a university that appraises the program.

Phase Five – Conducting the Pilot Test/ Cultural Adaptation of Materials

This stage can last anywhere from six months to two years. The teachers who were trained in the pilot workshop now return to their classrooms and begin implementing the program with their students. Teacher, student, parent, and administrator feedback is gathered over a predetermined time and relayed to the Translation and Adaptation Committee. The Translation and Adaptation Committee incorporates the feedback, if appropriate, and makes the necessary editorial changes to the curriculum (and to the workshop training model if necessary). Once the editorial content is finalized, the curriculum is designed and laid-out by professional graphics

artists. Finally it is sent to a printer for final printing. Sufficient quantities of the curriculum are printed to meet one or two years' workshop needs. The extra printed curricula are stored in a local warehouse.

Phase Six – Full Implementation/ Signing the Official Memorandum of Agreement

During this phase, teacher-training workshops are conducted on a regular basis. Depending on the number of training workshops likely to occur during the first two years of implementation, the associate may consider the certification of local trainers to conduct these workshops (without local trainers, the associate is required to hire Lions Quest Senior Trainers from neighboring countries to conduct the workshops).

An administrative entity is established to manage the day to day affairs of the fast-growing operation. The administrative entity should be able to schedule workshops, conduct billings, accept funds, disburse funds, manage inventory, and generally oversee the implementation of the program. This administrative entity then signs the official Memorandum of Agreement (MOA).

As you can see, there is much more to the implementation of the Lions Quest programs than just training teachers. However, there are some instances where the implementation phases may be shortened or skipped entirely. For example, if an existing language edition of the materials is acceptable without adaptation, then *Phase Three: Initial Translation* may be eliminated and phase five will be simplified. If the country only plans on conducting a few workshops a year (less than five, for example), it chooses to use an existing language translation, and it wants to use Senior Trainers from a neighboring country, than most of these steps may be eliminated. The choice is dependent on the specific situation in each country.

Detailed Checklist

Phase One – Indicating Interest

An entity makes contact with the Lions Quest department at the Lions Clubs International Foundation. [Contact names and information are located on the last page.] Informational materials are sent, including program overviews, brochures, summaries of evaluation results, etc. The entity (“associate”) uses these materials and any previous knowledge they may have of the program to make a preliminary assessment of whether the program would be appropriate for local implementation.

Checklist

- Contact is made with the Lions Quest Department at LCIF
- Informational materials are reviewed
- Preliminary program viability assessment is completed
- Decision is made to move ahead
- Entity requests copy of the full curriculum

Phase Two – Curriculum Assessment/Planning for the Future/Signing the Preliminary Memorandum of Agreement

Upon request, Lions Quest/LCIF will send a full copy of the curriculum depending upon the grades involved. The associate shares the curriculum with the appropriate experts and once again assesses its applicability. In general, the associate should be able to satisfactorily answer the following questions:

- 1 Is there a culture ‘fit’?
- 2 Is life skills, character education, drug prevention or service-learning an important aspect of that society’s value system?
- 3 Is the teacher training/classroom curricula methodology acceptable to the educational establishment?
- 4 Is the educational system able to accommodate the Lions Quest curricula based intervention? If structured education is unable to accommodate Lions Quest programs during the course of a normal school day, is it possible to implement the program outside of normal school hours with minimum inconvenience or cost?
- 5 Is funding currently available or could it become available to pilot, adapt and/or translate the program and administer the ongoing implementation of the program?
- 6 Is there sufficient support for the program from the sponsoring organizations (usually the local Lions multiple district) and from the Ministry of Education or similar national – level educational authority?
- 7 Is a single individual or a committee willing to coordinate the initial translation, pilot workshop, pilot test and ultimate implementation of the program?

If the associate can satisfactorily answer the above questions for themselves, a decision is made to move ahead.

The planning stage is critical to the success of the entire implementation process. Implementing Lions Quest programs is a detailed and long-range project that requires extensive planning for it to be successful. For this reason, Lions Clubs International Foundation seeks to closely manage implementation of Lions Quest to ensure success. If program implementation is not done with the required integrity, the eventual program adaptation will not be acceptable to the indigenous educational establishment and the reputations of Lions and Lions Quest will suffer.

The associate prior to fully committing to program implementation should review the International Core Principles document and the International Operating Guidelines.

During this stage of implementation, a Steering Committee is usually formed to oversee all the steps in the implementation process leading up to the establishment of a foundation or other administrative body. The Steering Committee usually consists of Lions, Ministry of Education officials, educators, parents, and other community leaders. The specific duties of the Steering Committee are as follows:

- 1 Assess the program by reviewing sample materials (if necessary, the Committee may seek the help of professional educators or consultants to assist them in this review) to determine if there is a basis to continue with implementation.
- 2 Together with Lions Quest, develop a three-year implementation plan that includes all steps necessary for the smooth, ongoing functioning of a local operation.
- 3 Identify or raise sufficient funds to complete the entire implementation process.
- 4 Network with Lions, the Ministry of Education and other stakeholders to obtain their enthusiastic support for the program.

The Preliminary Memorandum of Agreement (PMOA) is signed by the Steering Committee and/or the interim organization overseeing the implementation of the Lions Quest program. The Lions Clubs International Foundation also signs the PMOA as an agreement to work as partners and establish a mutually beneficial relationship to encourage growth and to maintain the quality of the Lions Quest program. This is a preliminary agreement to work together – if the program is later deemed inappropriate and is discontinued, the entity does not need to sign the Official Memorandum of Agreement.

Funding necessary to establish a local, self-sufficient operation needs to be raised by the associate. Recently, the Lions Clubs International Foundation (LCIF) made significant funding available under their “Core Four” grant guidelines; multiple districts may apply for these grants to help finance the establishment of the program. Grant applications can be obtained through LCIF.

Checklist:

- Following a thorough review of the curriculum, the associate indicates their desire to move ahead
- The Associate secures support from Lions/local education authorities (letter and/or resolution)
- International Core Principles and International Operating Guidelines are viewed
- Steering Committee is formed
- Steering Committee develops a three-year implementation plan and shares with Lions-Quest/LCIF
- The Steering Committee and/or the interim implementing organization along with the

Lions Clubs International Foundation signs the Preliminary Memorandum of Agreement (PMOA)

- Steering Committee commits to raising the necessary funds

Phase Three – Initial Translation

It is recommended that the Steering Committee establish a Translation and Adaptation Committee at this time. The Committee usually includes local educators (teachers experienced in curriculum development or university professors), child development experts, trainers, translators, print production professionals, etc. They are responsible for the technical adaptation and/or translation of the curriculum (actually re-write and translate the curriculum).

Initially, the Translation and Adaptation Committee should work with Lions Quest/LCIF to decide what materials will be used in the pilot workshop and test. In some cases English-Language materials (or an appropriate translation from another country) are adequate for the pilot workshop and test. However, in non-English speaking countries this limits participation in the pilot test to English speakers. If this is not acceptable, the Translation and Adaptation Committee will be required to do a rough translation of core workshop materials and the curricula. Specific guidelines for any translation or adaptation work are found in the *Operating Guidelines: Program Development*. As mentioned in these guidelines, all translation plans must be coordinated with Lions Quest/LCIF. Similarly any modifications to the teacher-training workshop must be coordinated with Lions Quest/LCIF.

Checklist

- Steering Committee establishes a Translation and Adaptation Committee
- Decision is made on what language version pilot materials will be used

Phase Four – Conducting a Pilot Workshop

The purpose of the pilot workshop is to train enough educators and other adults to successfully “field test” the Lions Quest program.

The Translation and Adaptation Committee will be responsible for conducting the pilot workshop and for incorporating into the final version of the curriculum the lessons learned during this pilot phase. It is the responsibility of the Translation and Adaptation Committee to localize the curriculum.

To successfully conduct a pilot workshop, the Translation and Adaptation Committee should:

- 1 *Identify and recruit teachers, education officials, interested Lions, parents, etc. to participate in the pilot workshop.* With a maximum of 36 people in a workshop, it is suggested that 1-4 schools be represented at the training. The choice of teachers is critical. It is important to invite schools and teachers who will offer a fair and honest assessment of the program during the pilot. The ‘ideal’ Lions Quest teacher:
 - Has a child-centered approach to teaching
 - Understands the cognitive, social and emotional development of children

- Supports the Lions Quest position of no illegal use of alcohol, drugs, tobacco or other harmful substances by children
- Has a positive and enthusiastic attitude about implementing the Lions Quest program

- 2 *Identify a workshop site.*
- 3 *Work with Lions Quest to have the necessary materials sent to the pilot workshop site (if English based materials are being used.)*
- 4 *Work with Lions Quest/LCIF to identify a LCIF approved International SENIOR trainer to conduct the pilot workshop.*
- 5 *Following the pilot workshop, again assess whether or not to move ahead with the next step in the implementation process.*
- 6 *Assuming the decision is to move ahead, develop a process for monitoring the progress of the individual teacher who attended the pilot workshop as they pilot the program locally (actually teach the program to students).*
- 7 *Provide the teachers with ways of providing feedback about their experiences in implementing the program. For example, the Committee could use written surveys, focus groups, interviews, etc. [See Phase 5] This feedback will be used by the Committee to guide the adaptation process.*

In order to document the impact of Lions Quest programs, many countries will consider a formal evaluation of the program. "Evaluation" refers to an in-depth study of the program and its impact on student behavior and outcomes. Most countries conduct both a 'pre-test' and a 'post-test', measuring students in the Lions Quest program before and after the program, and compare the data to a control group. Evaluations are often conducted by local universities or by some other unbiased group. For credibility, it is suggested that an outside group conduct the evaluation. For a sample evaluation test or general Lions Quest evaluation results, please contact Lions Quest Oak Brook.

Checklist

- A LCIF approved International Senior Trainer is identified to conduct the pilot workshop
- Participants are recruited for the pilot workshop
- Curricula and other workshop materials are sent to the pilot workshop site
- Pilot workshop is conducted
- Decision is made as to how program evaluation will be conducted

Phase Five – Conducting the Pilot Test/ Cultural Adaptation of Materials

The pilot test is the period from the conclusion of the pilot workshop through the final printing of the new, adapted version of the curriculum. If an associate uses an existing version without modification, then this phase may be skipped (e.g. Canada currently uses most of the original U.S. materials and, therefore, was not required to complete a formal adaptation).

The primary purpose of the pilot test is to assess the program in a classroom setting and gauge what changes or adaptations are needed to make the program appropriate for local implementation.

The Steering Committee, in consultation with the Translation and Adaptation Committee, needs to decide how long the pilot test will last. This may range from six months to two years. The more data gathered, the better the new edition will fit the local context. Once the classroom test is complete, a final decision about implementation needs to be made. At this point, the decision might be to discontinue the program because of insurmountable difficulties in adapting the program for local use. Lack of funding may also impact the decision to continue with implementation. The decision might be to conduct a second pilot test if insufficient feedback is obtained from educators in the first pilot test.

The Translation and Adaptation Committee is responsible for capturing feedback from teachers and for completing the adaptation process. This committee is also responsible for working with graphics design professionals to design, electronically lay out, and prepare the materials for printing.

Checklist

- Decision is made about the length of the pilot test
- Pilot test is completed
- Translation/adaptation is completed
- Decision is made whether to move ahead with full implementation

Phase Six – Full Implementation/ Signing the Official Memorandum of Agreement

During this phase, the Steering Committee should establish a legal entity that will continue to administer implementation of the program once the new materials are ready (e.g. a foundation or trust). The general duties of this entity are as follows:

- 1 Accept and disburse funds
- 2 Print, warehouse and distribute books/materials
- 3 Set up teacher training workshops and provide all logistical support for these workshops
- 4 Provide follow-up support to trained teachers
- 5 Promote the program amongst Lions and in the community
- 6 Conduct fundraising activities

The board of directors for this legal entity may include members of the Steering Committee and other important national leaders. Under the provisions of the Memorandum of Agreement, Lions Clubs International Foundation retains the right to one seat on this board of directors.

The Steering Committee should also appoint a Lions Quest Coordinator at this time. The Coordinator may be a paid or volunteer staff member. Other staffing such as an accountant, secretary, warehouse manager, etc., may be added as necessary.

Depending on the number of workshops to be conducted each year, the associate may wish to consider identifying and training local trainers to deliver Lions Quest workshops. Generally, it becomes cost-effective to train local trainers if an associate conducts more than five workshops per year. Irrespective of the number of workshops conducted each year, it may be necessary to train local trainers if the program is delivered in a local language unfamiliar to trainers in neighboring countries or in the region.

Lions Quest/LCIF, through its team of Senior Trainers throughout the world, is solely responsible for certifying local trainers. Please refer to the *Operating Guidelines: Training* for further information about the training and certification of national trainers.

Lions Quest/LCIF endeavors to maintain a close working relationship with each entity as it pilots the Lions Quest program and with each associate once the program is being implemented. In order to maintain a good working relationship, communication between all parties needs to be maintained. Lions Quest and the Lions Clubs International Foundation commit to sharing with their associates new programs and trainings as they are created as well as best practices from the field. Associates shall share local information with Lions Quest/LCIF so it can be shared with other associates in the network.

In the final step, the Official Memorandum of Agreement (MOA) is signed by the administrative entity (e.g. a foundation or trust) and a payment arrangement is agreed upon. If the administrative entity is not operational at the time the MOA is signed, then an interim group may sign the MOA. If an interim group signs the MOA all terms and conditions contained in the signed MOA must be transferred to the ultimate administrative entity. Once the MOA is signed, the entity is considered to be a formal Lions Quest associate. The benefits of partnership include:

- 1 Legal rights to adapt, print, distribute and use Lions Quest intellectual property within the geographic boundaries of the Associate's country.
- 2 Ongoing technical assistance from Lions Quest's operating office at the Lions Clubs International Foundation in Oak Brook, Illinois, USA.
- 3 Periodic program updates.
- 4 Input on future program development and adaptation to existing programs.
- 5 Access to Lions Quest grants through the Lions Clubs International Foundation's Core Four Grants.
- 6 The Coordinator or Country Director is invited to all subsequent Country Directors' Meetings. These meetings are a combination of information sharing, skill building, and planning.

Checklist

- Legal foundation or trust is formed
- Lions Quest Coordinator or Country Director is appointed
- Decision is made about establishing a national training team
- Entity signs and returns the Memorandum of Agreement (MOA)
- Materials are printed and stored in warehouse

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International Core Principles

1. International Vision

LCIF seeks to provide sustainable, effective life skills programs to all children and youth throughout the world. In doing so, LCIF will embrace the diversity of cultures and will uphold certain fundamental values and beliefs that transcend local traditions, norms and cultures.

Lions Quest believes in and adheres to the following values:

- All young people throughout the world have the innate right and capacity to develop their full potential as responsible and caring individuals.
- Fostering the positive potential in all young people is a critical global priority and must be cultivated and strengthened by the world's adults and their institutions.
- Young people become personally and socially responsible and develop strong character by learning and applying essential life skills in meaningful contexts.
- The values, attitudes and knowledge necessary for personal and a social responsibility include the timeless principles of respect and caring for self and others; honesty and trustworthiness; a sense of justice and fairness; service to others; capacity for critical thinking and problem solving; and commitment to family and community.
- Parents are the primary educators of their children, and enduring, nurturing relationships with caring adults are essential for young people to grow and flourish.
- The power and breadth of Lions Quest's mission can best be achieved through dynamic, mutually beneficial relationships with other organizations and associations.
- Promoting healthy, responsible, caring behaviors requires that adults work together to build lasting foundations for positive learning experiences in all arenas where young people live, learn, work, and play.

2. Alliances

- LCIF and Lions Quest strive to develop reciprocal working relationships that are mutually reinforcing and beneficial.
- Lions Quest associates are encouraged to seek a wide array of other supporting organizations that can assist in gaining acceptance for the program, collaborate with in-kind support or financially assist with the successful implementation of Lions Quest programs and training.

3. Programs and Training

The development of relevant and timely curricula and training remains a primary focus of Lions Quest at LCIF. The success of the Lions Quest programs and training are dependent upon those who work closest to the realities and understand the needs, obstacles and opportunities of participating communities. LCIF understands the diverse needs of

communities throughout the world and thus is open to broad culturally and educationally appropriate adaptations of existing programs for local use.

- LCIF works collaboratively with Associates throughout the world. An “Associate” is defined as a non-profit entity that has entered into a Memorandum of Agreement providing for the implementation of Lions Quest programs in a particular country (other than the United States).
- Each Associate may develop supplemental programs, training and associated materials, at its own cost.
- The Associate expressly acknowledges that all rights, title and interest in and to the Program (including without limitation all supplemental products, services, training and materials created by LCIF Lions Quest and used in conjunction with or associated with the Program) are and shall remain, the sole property of LCIF.
- Associates shall use the Lions Quest or Lions Clubs International Foundation name, logo or any other associated trademark on supplemental programs only with prior written approval from LCIF.
- LCIF remains the locus of program and training quality supervision.

4. Operations

In order to develop and maintain a healthy international system, the autonomy and independence of all Associates and LCIF are recognized and affirmed. In this regard, all Associates will be responsible for their own business operations, finances and staff. LCIF bears a responsibility to the international system as a whole of ensuring the system’s responsible and continued growth.

Criteria for Becoming a LCIF Associate:

Entities wishing to become part of the LCIF Lions Quest system are required to meet certain minimum criteria. These criteria include:

- A shared belief in the vision and mission of Lions Quest and a commitment to furthering that vision and mission through the innovative use of programmatic tools and strategic alliances;
- An established collaborative relationship with the corresponding Lions Clubs International District or Multiple District functioning in the respective country.
- A commitment to communicate on a regular basis with LCIF Lions Quest Department by periodically providing LCIF with a written summary of workshop and material sales activity and programmatic reports;
- A shared commitment to collaboration;
- Sufficient funds to provide ongoing support to local trainers and to provide funds for their attendance at annual meetings;
- An established relationship with individuals or institutions capable of adapting, translating and otherwise modifying existing programs and training or creating new programs and training for use locally;

- Sufficient local funds to support either the adaptation, translation, manufacture and initial implementation of existing programs and training (in both pilot and final form) or the creation of new programs and training;
- Sufficient funds to cover the travel costs of the Executive Director or designated representative to periodic International Country Director Meetings;
- An established volunteer or other structure to sustain and expand programs;
- A commitment to complying with all other policies and guidelines as laid out in this document and in the various Operating Guidelines.

5. Governance

LCIF believes that sustainable programs and training are best achieved where individual Associates are responsible for delivering the program and managing the Lions Quest operations through locally constituted, non-profit entities with independent governing boards.

LCIF recognizes that in some instances pre-existing educational agencies and organizations may administer Lions Quest programs. In such cases, some of the governance requirements and guidelines may be modified to accommodate these unique working relationships. These modifications will be reflected in the Memorandum of Agreement applicable to that Associate.

Foundation Status:

After a pre-determined startup phase, each Associate will establish a local foundation or other non-profit entity to oversee business operations, to insure adherence to international operating and policy guidelines, and to set and monitor policy. The governing instrument of such foundation or other non-profit entity shall provide that the Associate's assets and revenues shall be committed, perpetually and exclusively, to the furtherance of life skills programs for youth.

Board of Directors:

Each Associate shall establish an independent board of directors drawn from Lions, business, government, supporting organizations, the education community, and the non-profit community.

LCIF retains the right to appoint one member to each Associate's board of directors but such appointee will not, in any instance, serve as Chair of that board. All travel costs incurred by such appointee will be borne by LCIF.

6. Finances

In order to sustain ongoing, innovative program development, Associates agree to contribute toward the costs of original program development. Except whereas otherwise

provided in the Memorandum of Agreement, Associates shall make yearly program development payments.

Yearly Licensing Fees:

Such payments will be paid on or before June 30th every year based upon a predetermined formula (See Exhibit B in the Memorandum of Agreement).

All program development payments will be paid to LCIF in U.S. dollars. The exchange rate will be calculated on the program development payment due dates.

Independent Audit:

- All Associates are required to conduct an independent audit at the end of each fiscal year.
- An accredited auditing firm will conduct all audits.
- A copy of the annual financial audit (in English) will be provided to LCIF and received from Associates within three months of the close of the fiscal year.
- All Associates agree to share annual reports within one month of their availability.

7. Legal

All Associates are required to enter into formal, legally binding, written agreements with LCIF.



Communication

From LCIF Lions Quest Department:

LCIF pledges to send the following reports and will communicate with its associates in the following ways:

Annually

- LCIF Annual Report
- Attend the annual LCI international convention

Monthly or Bimonthly

- International newsletter or update
- Informational pieces from headquarters

When Available/Necessary

- Updates on new products, supplemental programs and trainings
- Updates on operations (i.e. staff changes, procedural changes)
- Samples of promotional pieces
- Samples of articles, press releases, etc.
- Telephone, fax, email technical assistance

From the Associate:

The associate commits to communicating with LCIF in the following ways:

Annually

- Annual report
- Annual Financial Audit
- Statistical update of number of workshops held, number of teachers trained and material sales
- Payment of Yearly Licensing Fee

Quarterly

- Narrative highlighting activities, events and happenings during the previous quarter

When Available/Necessary

- Updates on new products, programs and trainings
- Updates on operations (i.e. staff changes, new trainer information)
- Samples of promotional pieces
- Samples of articles, press releases, etc.



Operating Guidelines: Program Development

These are the guidelines involved in the successful **translation, adaptation and training** of teachers and trainers of a Lions Quest program.

Translation and Adaptation:

1. Literal translation of existing Lions Quest programs
2. Adaptation and translation of existing Lions Quest programs
3. Supplemental program development
4. Pilot-testing
5. Translation standards
6. Program development standards
7. Lions Clubs International Foundation core values and beliefs

Training:

1. Establishing a training team
2. Expanding an in-country training team
3. Management of and support for an in-country training team
4. Developing/adapting Lions Quest workshops
5. Training in Lions Quest program revisions, supplemental programs/ training products
6. Training of Trainers Program
7. Certification of Senior Trainers (Trainers of Lions Quest trainers)
8. Training management information requirements

Translation and Adaptation

1.0 LITERAL TRANSLATION OF EXISTING LIONS QUEST PROGRAMS

- 1.1 Before a literal translation from an existing version of a Lions Quest program begins, plans for such a translation should be submitted to LCIF. LCIF will provide written approval for such a translation and approval will not be unreasonably withheld or delayed. In general, after plans for the translation have been agreed upon, no further approval is required from LCIF.

2.0 ADAPTATION AND TRANSLATION OF EXISTING LIONS QUEST PROGRAMS

- 2.1 If cultural adaptations are made to the Lions Quest program materials, the Chair of the Translation and Adaptation Committee must send a summary of the recommended adaptations to LCIF before the actual adaptation and translation process begins.
- 2.2 Once consensus is reached with LCIF on the adaptation process, the Chair of the Translation and Adaptation Committee assumes responsibility for assuring that the final adaptations and translation conform to the agreed upon adaptations.
- 2.3 A summary report must be sent to LCIF at the conclusion of the adaptation, for approval, before the production of the materials commences.

- 2.4 A complete set of adapted materials should be provided to LCIF from the original production run.
- 2.5 Refer to 5.0 "*Translation Standards.*"

3.0 SUPPLEMENTAL PROGRAM DEVELOPMENT

3.1 "Supplemental Programs" are defined as programs that enhance and add value to existing Lions Quest core programs and that contain original content. "Original content" is defined as written, photographic or illustrative material that does not exist in an already published Lions Quest program (whether in its original or adapted form.) Each Associate may develop "supplemental programs" and associated materials under the following conditions:

- The Associate develops the program or materials at its own cost;
- All supplemental programs and materials subscribe to the existing core values and program development standards as contained in these Operating Guidelines if they are labeled Lions Quest materials;
- The LCIF or Lions Quest name, logo or any other associated trademark may only be used in conjunction with a supplemental program or product after receiving prior written approval from LCIF and LCI.

3.2 Prior to developing supplemental programs, each Associate must submit for peer review, to the Lions Quest department at LCIF, a concept paper describing the elements of the program or product that show compliance with the "*Program Development Standards*" (see 6.0):

- The goals, objectives, and desired outcomes of the program;
- The conceptual framework, program components, and scope and sequence, if applicable;
- Resources needed to support the development;
- Cooperating individuals and organizations.

3.3 Prior to publication, each Associate will submit to the Lions Quest department at LCIF a draft or prototype of the supplemental program.

4.0 PILOT-TESTING

4.1 All translations and adaptations of existing programs and the development of all supplemental programs should undergo a period of pilot testing prior to full-scale implementation. The pilot-test helps determine the further success of the program.

4.2 In some cases an Associate may forego the pilot-test period. The decision to forego the pilot-test will be made after consultation with LCIF.

5.0 TRANSLATION STANDARDS

- 5.1 The endorsed method for translation and adaptation of the Lions Quest program is as follows:

Stage 1: Literal Translation [Initial Translation]

- Educators, prevention authorities, and others are recruited by the Associate to serve on the Translation and Adaptation Committee to review and critique the technical translations and adaptations. LCIF retains the right to suggest individuals as members of this Committee.
- Professional translators and writers are invited to translate and adapt specific sections of the program materials. The Translation and Adaptation Committee then reviews these submissions.
- A contract between the selected translator(s) and/or writer(s) and the Translation and Adaptation Committee is signed.
- The translator(s) and/or writer(s) complete the first technical edition. In addition, they are responsible for delivering a printed copy and a computer disk copy that is compatible with commercial typesetting equipment to the Associate.
- Review copies are printed and distributed to the Translation Committee. The members are asked to review the work and indicate what is acceptable, what needs further editing and adapting, and what is culturally incompatible and needs to be replaced with new material.

Stage 2: Cultural adaptation and pilot testing

- Within the guidelines set by LCIF and with the suggestions of the Translation and Adaptation Committee, the translator(s) and writer(s) provide a second stage adapted printed copy and a copy on computer disk.
- Sufficient copies are printed or photocopied for review and testing.
- Program materials are distributed to test schools and the pilot test begins after the training of teachers.
- Teachers write critiques as they conclude teaching each unit. Suggestions are reviewed by the members of the Translation and Adaptation Committee who make recommendations.

Stage 3: Final revisions and edits

- The writer(s) makes final adjustments, rewrites, and edits. Graphics are finalized at this stage. The writer(s) provides a final printed copy and computer disks of finished work to the Associate.
- A final version is provided to LCIF for review.
- The Associate prints a first edition and distributes it to schools with qualified teachers.
- Mistakes and needed changes are noted and corrections made before the second printing.

6.0 PROGRAM DEVELOPMENT STANDARDS

6.1 Lions Quest Underlying Principles:

All programs and products bearing the Lions Quest name will address the needs of children and young people ages 5-19 as well as reflect the nine underlying principles of effective positive youth development programs. Those principles are:

- Programs are developmental in approach, comprised of research-based, sequential skill-building learning experiences rather than a random series of exercises;
- A positive and safe school climate is ensured so that each child has the opportunity to learn and grow;
- Parent involvement is integral to program success, and parents are encouraged through the program design and materials to participate in meaningful ways;
- Training is required for all adults implementing comprehensive life skills programs and strongly encouraged for all supplementary units of study;
- A blueprint for collaboration and partnership between home, school, and community is included in the program design and materials;
- All programs are developed to be culturally relevant to diverse student populations
- Evaluation and accountability are required and assessment opportunities are included in the program design and materials;
- Programs are values-based, emphasizing the core positive values of self-discipline, responsibility, healthy living, volunteer service, and commitment to family, school, peers, and community;
- Community involvement is assured through partnerships with community-based organizations and agencies that support the goals of the program at the local level.

6.2 Core Values and Beliefs:

All programs and products bearing the Lions Quest name will reflect Lions Quest core values and beliefs:

- All young people throughout the world have the innate right and capacity to develop their full potential as responsible and caring individuals.
- Fostering the positive potential in all young people is a critical global priority and must be cultivated and strengthened by the world's adults and their institutions.
- Young people become personally and socially responsible and develop strong character by learning and applying essential life skills in meaningful contexts.
- The values, attitudes, and knowledge necessary for personal and social responsibility include the timeless principles of respect and caring for self and others; honesty and trustworthiness; a sense of justice and fairness; service to others; capacity for critical thinking and problem solving; and commitment to family and community.
- Parents are the primary educators of their children, and enduring, nurturing relationships with caring adults are essential for young people to grow and flourish.
- The power and breadth of LCIF's mission can best be achieved through dynamic, mutually beneficial relationships with other organizations and associations.

- Promoting healthy, responsible, caring behaviors requires that adults work together to build lasting foundations for positive learning experiences in all arenas where young people live, learn, work, and play.

6.3 Conceptual Model for Positive Youth Development:

All programs and products bearing the Lions Quest name will:

- Promote positive external conditions. When external conditions (positive environment, skill instruction, information) are addressed by caring adults in a young person's life, they influence the internal conditions (self-perception, motivation, cognition) that lead to positive behaviors (self-discipline, responsibility, good judgment, getting along with others, resisting negative behaviors, providing service to others) and a strong commitment to family, school, positive peers, and the community. The result is a young person who is more resilient and likely to engage in healthy and prosocial behaviors.
- Reflect LCIF's position that young people shall not engage in the use of illegal drugs or illegally use alcohol, tobacco, or other drugs. For the purposes of clarification, "drug" is defined as "any substance, excluding food and water, that alters the functioning of the body" (World Health Organization definition).

6.4 Programmatic Skill Arenas:

All programs and products bearing the Lions Quest name will build upon nine main skill arenas:

- Building self-discipline, responsibility, and self-confidence
- Communicating effectively and cooperating with others
- Managing attitudes and emotions
- Strengthening positive relationships with family and peers
- Learning and developing skills in solving problems and making healthy decisions
- Resisting negative peer pressure and drug use
- Thinking critically
- Setting goals for healthy living
- Providing service to others

6.5 Youth Advocacy Arenas:

All programs and products bearing the Lions Quest name will:

- Support, enhance, enrich, and expand LCIF's youth advocacy arenas and opportunities:
 - Social and personal development
 - Health promotion
 - Drug misuse prevention
 - Parenting skills
 - Peace Promotion and violence reduction
 - Family and community health and well being
 - Career education
 - Relationships and self-esteem
 - Involvement and commitment
 - Volunteerism

- Service and service-learning
- Evaluation and research



Operating Guidelines: Training

1.0 ESTABLISHING A TRAINING TEAM

- 1.1 Associates implementing Lions Quest programs capable and desirous of funding a Training of Trainers (TOT) program (see the document entitled: Lions Quest Training of Trainers (TOT) Program for a description of the TOT process) and providing on-going trainer support may establish a Lions Quest training team.
- 1.2 The first Lions Quest trainers(s) will be trained by a Senior Trainer selected by Lions Clubs International Foundation (LCIF) with its consulting partner, the Service-Learning Life Skills Network and the Lions Quest International Training Coordinator, with the agreement of the Associate. Selection of trainer candidates is made jointly by LCIF and the implementing Associate.
- 1.3 Training can take place anywhere if appropriate conditions support candidates' success. TOT reports are provided to LCIF and the Lions Quest International Training Coordinator for review and approval of candidates' continuation in the TOT program. Costs are borne by the implementing Associate.
- 1.4 For approved Lions Quest program adaptations that call for a dramatically different set of teacher behaviors, trainer preparation and guidelines for selection will be modified to accommodate the new delivery approach.

2.0 EXPANDING IN-COUNTRY TRAINING TEAM

- 2.1 Additional trainers are trained by Senior Trainers selected by LCIF and the Lions Quest International Training Coordinator and the Associate following the conditions specified in 1.2 and 1.3 (except where 2.2 applies).
- 2.2 Associates capable of funding the training of a Senior Trainer and his/her on-going support may establish their own TOT capacity following the procedures in the document entitled: Lions Quest Senior Trainer Certification Program.
- 2.3 Trainer candidates are selected jointly by the Associate and the Senior Trainer. LCIF and the Lions Quest International Training Coordinator are advised of selections.
- 2.4 The Senior Trainer trains trainer candidates following the Lions Quest TOT Program (See the document entitled: Lions Quest Training of Trainers (TOT) Program). Final evaluation reports and new trainer contact information are provided to the Lions Quest International Training Coordinator. LCIF confirms certification and provides certificates.

3.0 MANAGEMENT OF AND SUPPORT FOR IN-COUNTRY TRAINING TEAM

- 3.1 Associates are encouraged to provide on-going professional training support for their training team members. Strategies could include establishing a support or lead-trainer role in-country, linking the team with other Multiple districts or country teams' "support/lead trainers," connecting the team with LCIF or other strategies identified by the Associate.

- 3.2 Associates are encouraged to establish a system for monitoring/evaluating trainer performance. The Lions Quest International Training Coordinator will provide counsel and support on an as-needed basis to assist Associates in correcting trainer performance problems.
- 3.3 Associates are encouraged to convene their training team in-country or with other Associates' teams on an annual basis. LCIF staff and the Lions Quest International Training Coordinator will participate in such meetings as requested by the Associates and as feasible. Where attendance is requested, travel expenses would be paid by the Associates. LCIF would incur LCIF and the Lions Quest International Training Coordinator's staff time.

4.0 DEVELOPING/ADAPTING LIONS QUEST WORKSHOPS

- 4.1 Any adaptations to existing Lions Quest training designs shall be approved by LCIF and the Lions Quest International Training Coordinator.
- 4.2 Associates wishing to develop supplemental training products (e.g. workshops, videos) are encouraged to seek counsel from LCIF and the Lions Quest International Training Coordinator in their development/selection. Content, strategies, and TOT requirements for training products carrying the Lions Quest name should be agreed upon by the Associate and LCIF prior to release of the supplemental training products.
- 4.3 Core guidelines for developing supplemental workshops are:
 - Incorporation of group development and adult learning theories and practices
 - Sensitivity to cultural differences
 - Consistency with Lions Quest core values
 - Statements of goals with measurable outcomes
 - Incorporation of experiential learning strategies
 - Support of Lions Quest youth advocacy positions

5.0 TRAINING IN LIONS QUEST PROGRAM REVISIONS, SUPPLEMENTAL PROGRAMS/TRAINING PRODUCTS

- 5.1 Prior to implementing supplemental Lions Quest programs, Associates will assure that trainers are trained in appropriate workshop designs. Requirements for training will vary by program/product and include workshop, phone coaching, and/or written manuals and direct training by Lions Quest - designated staff/trainers. The specific form of training of trainers will be determined through consensus with LCIF.
- 5.2 Associates who have developed supplemental programs which carry the Lions Quest name and require training will determine, with consensus from LCIF, the type of trainer preparation and with the approval of LCIF will deliver TOT services to other Associates using the supplemental program.

6.0 TRAINING OF TRAINERS PROGRAM

- 6.1 LCIF strongly believes in the importance of quality preparation of instructors in the use of its programs. Therefore, program materials are made available to instructors only upon their successful completion of the appropriate program workshop (Lions Quest Skills for Adolescence [ages 10-14] or Skills for Growing [ages 5-9] or Skills for Action [ages 15-19]).
- 6.2 Staff development training led by Lions Quest certified trainers is strongly recommended for supplemental units to Lions Quest core programs (e.g. Exploring the Issues: Teens, Alcohol and other Drugs).
- 6.3 Program workshops are led by LCIF-approved trainers only. In keeping with its commitment to quality instructor preparation, LCIF maintains high standards for trainer selection and preparation for the trainer role.

See the document entitled "Lions Quest Training of Trainers (TOT) Program".

7.0 CERTIFICATION OF SENIOR TRAINERS (TRAINERS OF LIONS QUEST TRAINERS)

See the document entitled "Lions Quest Senior Trainer Certification Program".

8.0 TRAINING MANAGEMENT INFORMATION REQUIREMENTS

- 8.1 Senior Trainers will provide to LCIF and the Lions Quest International Training Coordinator the two final (solo) evaluation reports for all new training team members to also include name, address, phone, e-mail and other contact information.
- 8.2 Associates will provide to LCIF and the Lions Quest International Training Coordinator if requested, an annual summary of workshop and bi-yearly trainer evaluations completed by workshop participants.
- 8.3 Associates will provide to LCIF updated names, addresses, phone numbers and e-mails of all training team members.

9.0 SUMMARY OF TRAINER LEVELS, RESPONSIBILITIES, AND CERTIFICATION PROGRAMS

Lions Quest Trainer

Responsibilities: Facilitate Lions Quest workshops for teachers and others who will use program materials with young people, as assigned by the Lions Quest country office or LCIF.

Certification: Successful completion of the Lions Quest Trainer of Trainers Certification Program, which, at minimum, consists of four steps: 1) Participation Workshop, 2) Observation Workshop, 3) Co-Lead Workshop with one coaching day before and after, and

4) Solo Workshop with one coaching day before and after. Another option is a Four-Day Coaching Seminar rather than interspersed coaching days, which occurs in place of the Observation Workshop. A Lions Quest certified Senior Trainer supervises the TOT Program.

Senior Trainer

Responsibilities: Supervise the Lions Quest Training of Trainers Certification Program for trainer candidates following the Lions Quest four-step plan (see above). Senior Trainer assignments are made by the Lions Quest country office, and for out-of-country assignments, by LCIF and the Lions Quest International Training Coordinator.

Certification: Successful completion of the Lions Quest Senior Trainer Certification Program. The program consists of three steps: 1) Certification as a Lions Quest trainer, 2) 2-Day Senior Trainer Coaching Seminar, and 3) Two-Day Practicum, at which the Senior Trainer candidate coaches the Lions Quest trainer candidate under the supervision of a Lions Quest Senior Trainer Coach. Trainers may apply to the Senior Trainer Certification Program following the successful facilitation (defined as achieving an average of 90% superior ratings on all scales of workshop evaluations) of a minimum of 20 Lions Quest workshops. A Lions Quest certified Senior Trainer Coach supervises all aspects of the Senior Trainer Certification Program.

Senior Trainer Coach

Responsibilities: Conduct the Lions Quest Two-Day Senior Trainer Certification Seminar and supervise the Senior Trainer candidate's Two-Day Practicum. Provide to LCIF and the Lions Quest International Training Coordinator an evaluation report of candidates' performance at the Observation, Co-Lead, and Solo Workshops and provide recommendations regarding next steps at each level and certification at the end of the process.

Certification: Successful completion of the Lions Quest Senior Trainer Coach Certification Program under the supervision of a Lions Quest Master Trainer. Candidates are to have successfully supervised, at minimum, three Lions Quest Trainer Certification Programs. The Senior Trainer Coach Certification Program consists of preparation for facilitation of the Lions Quest Two-Day Senior Trainer Coaching Seminar and Two-Day Practicum. Senior Trainer Coach assignments are made by LCIF.

Master Trainer

Responsibilities: Conduct the Lions Quest Senior Trainer Coach Certification Program, which includes providing coaching in the facilitation of the Two-Day Senior Trainer Coaching Seminar and the Two-Day Practicum. Provide to LCIF an evaluation report of the candidate's performance and recommendation regarding certification.

Certification: Successful supervision of at least five Senior Trainer Certification Programs, and/or demonstration of excellence in preparing Lions Quest trainers. For certification, Master Trainers receive coaching from a Lions Quest Master Trainer in the conduct of their responsibilities. LCIF makes Master Trainer assignments.

10.0 Addendum to International Training Guidelines

10.1 Guiding Principle

Only certified Lions Quest trainers are authorized to conduct Lions Quest professional development workshops, including follow-up workshops, to ensure that Lions Quest branded workshops are consistent with L-Q teaching and learning approaches.

10.2 Overview of the current Lions Quest International Training Team Organizational Chart

LCIF owns the Lions Quest copyright and programs. The Lions Quest Manager supervises the LCIF-related Lions Quest activity in the world. The Country Directors manage the day-to-day operations of their Lions Quest offices according to the Lions Quest International Guidelines. The Lions Quest International Training Coordinator serves as the point person for all international training activity at LCIF, coordinates communication regarding ongoing international training innovations and activity, and monitors adherence to the LCIF International Training Guidelines. The Master Trainers, Senior Trainer Coaches, Senior Trainers, and trainers in each country are certified by LCIF and report directly to their Lions Quest Country Office. Country Directors and Senior Trainers share their training innovations and learning through the LCIF Lions Quest office and the International Training Coordinator.

10.3 Roles and responsibilities of the Lions Quest International Training Team

International Training Coordinator:

- Designated by LCIF. All actions of the International Training Coordinator are in coordination with and in representation of LCIF.
- Coordinates the selection of new trainers in countries without senior level trainers, beginning with the approval of all trainer applications.
- Approves and certifies all levels of trainers through LCIF.

- In coordination with LCIF, assigns trainers for international work outside their country borders.
- Coordinates the communication and sharing among the Senior Trainers of ways to continuously improve international trainings, including new programs, products, training processes, resources, etc.
- Supports the international trainers in upholding the LCIF standards of high quality training.

Master Trainer:

- Is qualified to prepare and recommend for certification Senior Trainer Coaches (STC) as well as all other levels of trainers.
- May provide counsel and coaching to STC, ST, and trainers in designated regions.
- May provide counsel to LCIF, the International Training Coordinator, and CDs in preparing new countries to adopt Lions Quest programs and select appropriate candidates.
- May be skilled and available for program presentations, writing of articles, development of materials, etc. (Compensation standards to be determined for work beyond current scope.)

Senior Trainer Coach

- Is qualified to prepare and recommend for certification Senior Trainers as well as regular trainers.
- May provide counsel and coaching to STs and trainers in designated regions.
- May be skilled and available for program presentations, writing of articles, development of materials, etc. (Compensation standards to be determined for work beyond current scope.)

Senior Trainer

- Is qualified to prepare and recommend for certification Lions Quest trainers.
- May provide counsel and coaching to trainers, including preparing trainers to offer follow-up training after the introductory workshop.
- Counsels/partners with Country Directors in decisions that affect the quality and content of Lions Quest training.
- Available to read trainer evaluations and alert Country Director to trainers that need additional coaching because evaluations are below standard.
- Note: In countries without Senior Trainers, the Country Director reviews the evaluations and should seek the guidance of the Senior Trainer working in their country about potential problems and how to handle them.
- May be called upon to visit certified trainers during their workshops.
- May be skilled and available for program presentations, writing of articles, development of materials, etc. (Compensation standards to be determined for work beyond current scope.)
- As part of professional development and as finances and circumstances permit, may be invited to observe and participate in workshops in other countries.

Trainer

- Teaches educators and other supportive adults the L-Q programs.
- May be skilled and available for program presentations, writing of articles, development of materials, etc. (Compensation standards to be determined for work beyond current scope.)

10.4 International, standardized criteria, procedures, and approval processes for becoming a Lions Quest Master Trainer, Senior Trainer Coach, Senior Trainer, and Trainer

- **Master Trainer:** Is eligible for LCIF certification after successfully preparing 5 Senior Trainers. Trainer may apply to LCIF for consideration of this designation, since no TOT is required.
- **Senior Trainer Coach:** Has prepared 5 Trainers and been certified after successfully participating in the two-day Senior Trainer Coaching Seminar and conducting the Senior Trainer Coach Practicum (2 – 3 days, depending on the length of the workshop) under the supervision of the Master Trainer.
- **Senior Trainer (TOT):** Has conducted 20 high quality Lions Quest workshops (with 95% satisfied participants), meets all criteria in the Senior Trainer Application Form, and has been certified after successfully participating in a two-day Senior Trainer Coaching Seminar and conducting a Senior Trainer Practicum (2 – 3 days, depending on the length of the workshop) under the supervision of a Master Trainer or Senior Trainer Coach. Note: Only LCIF may approve exceptions due to unique country-specific circumstances.
- **Lions Quest Trainer:**
 - Meets all the criteria in the LCIF TOT Application Form.
 - Additional recommendations for the selection process:
 - First trainer candidate(s) in a country must be a well-educated, mature, experienced facilitator with credentials in the positive youth development field in order to establish the L-Q program and its reputation for excellence in a country.
 - New trainer candidates are more likely to be successful if they have recently experienced a mentoring relationship with ongoing evaluation and constructive feedback and a reflective process that allows for thoughtful self-reflection.
 - In countries with Master Trainers, Senior Trainer Coaches and Senior Trainers, a senior level trainer must be involved in the selection and interview process before the candidate begins the TOT process.

- In countries without Senior Trainers, LCIF and the International Training Coordinator will approve the selection of trainer candidates per the required TOT Application Process. In these cases, LCIF will designate a Senior Trainer who will be involved in the selection and interview process.
- A video is strongly recommended of a new trainer candidate if the senior level trainers involved have never met the candidate in person and observed them facilitate of group of adult learners.
- New trainer candidates must be available for a sizable number of training days required by a country's expansion plan to make the investment in them worthwhile.
- New trainer candidates should be sought in response to a well-thought-through plan that requires more trainings per year than the current team can manage.
- Lions Quest trainers should limit their workshops to no more than 30 per year to ensure high quality and appropriate time for reflection and rest.
- Trainer candidates may be sought from workshops, the positive youth development field, universities, and corporate settings using compatible facilitation approaches.
- When a new trainer candidate is being prepared, Master Trainers and Senior Trainer Coaches in the region will be informed and may be invited to provide counsel.
- The standard TOT Process contemplates two solo workshops, but the Senior Trainer has the authority to certify after one solo if the candidate demonstrates mastery of skills (to the delight of the sponsor and candidate).
- Follow-up customized workshops that follow the introductory Lions Quest workshops and are branded "Lions Quest workshops" must be conducted by certified Lions Quest trainers to ensure consistency with the original training.

10.5 Criteria utilized by LCIF in the designation of Senior Trainers and trainers to train across country borders and the monitoring of international training.

The following criteria will be utilized in the selection of Master Trainers, Senior Trainer Coaches, and Senior Trainers for TOT outside country of residence,:

- Track record of excellence in conducting TOTs
- Track record of working well with participants from the host country or diverse participants.
- Strong skills in working in difficult, unpredictable situations.

- History of timely and accurate completion of all TOT tasks, e.g.; high quality TOT reports turned in immediately after the TOT with thoughtful comments and coaching suggestions
- Language skills
- Financial considerations

The following criteria will be utilized in the selection of trainers to conduct (non-TOT) training in a country outside country of residence,:

- Track record of working well with participants from the host country or diverse participants.
- Strong skills in working in difficult, unpredictable situations
- History of excellent evaluations
- Language Skills
- Financial considerations

Selection of trainers to train outside country borders will be made or approved by LCIF and the LCIF International Training Coordinator with consultation from Country Directors, Master Trainers, and senior level trainers as appropriate.

International trainers' effectiveness when training across borders will be monitored by LCIF based upon evaluations from participants and sponsors.

10.6 The minimum number of workshops a trainer should do a year to remain active and the appropriate steps to be taken when trainers do not meet that standard.

- Trainer should do at least 3 workshops per year.
- If that standard is not met, arrangements should be made to provide coaching support from a Senior Trainer.

10.7 Designation and use of "lead teachers"

The LCIF training guidelines do not formally create a designation for "lead teachers". However, if country offices wish to designate and train select local teachers to assist schools in their area with the implementation of the program, they are authorized to do so. The exact role of such "lead teachers" would be defined by the country office and may include providing guidance for new teachers implementing Lions Quest and hosting local meetings to discuss challenges and options for program implementation. Such meetings, however, should not be referred to as formal Lions Quest workshops or staff development institutes. The corresponding country office should develop a written plan for the selection, training and oversight of lead trainers, in coordination with their national training team. This plan should be submitted to LCIF.



MEMORANDUM OF AGREEMENT (MOA) BETWEEN ORGANIZATION AND COUNTRY AND LIONS CLUBS INTERNATIONAL FOUNDATION

This **Memorandum of Agreement** (this "Agreement") is entered into, effective the [number](#) day of [month, 2004](#), by and between Lions Clubs International Foundation ("LCIF") and [Organization and Country](#) (the "Associate") and supersedes all existing agreements between the parties including those assigned to LCIF by Quest International (International Youth Foundation) licensing the program. In consideration of the mutual promises contained herein, the parties to this Agreement agree as follows:

Section 1. Primary Undertakings of LCIF

1.1 Definition of the Program: LCIF is the owner of certain life skills programs, which have been developed for use in schools and communities and have been endorsed by the Association of Lions Clubs International ("Lions"). The specific programs which will initially be made available by LCIF to the Associate pursuant to this Agreement are presented under the following titles:

- [The Lions Quest Skills for Growing Program](#)
- [The Lions Quest Skills for Adolescence Program](#)
- [The Lions Quest Skills for Action Program](#)
- [The Lions Quest Exploring the Issues: Teens-Alcohol and Other Drugs Program](#)

[The foregoing, existing programs (together with any translations thereof and any adaptations, modifications or supplementations thereto) and all other Lions Quest programs, products and services which are, at any time, owned by LCIF and made available to the Associate pursuant to this Agreement are hereinafter referred to as the "Program."]

1.2 License to Use the Program in the Region: During the term of this Agreement and on the terms and conditions set forth in this Agreement – including, but not limited to, Lions Quest's International Implementation Guidelines (which is attached hereto as Exhibit A and is incorporated herein by this reference), LCIF hereby grants a non-exclusive license to the Associate to use, produce and distribute the Program within the geographic boundaries of [\[Region\]](#) (the "Region"). The Associate shall not use, reproduce or distribute the Program outside the Region.

1.3 Sample Program Materials: During the term of this Agreement, LCIF will provide the Associate with sample copies of all curriculum and training materials, which LCIF owns and endorses for use in the implementation and/or adaptation of the Program in the Region. LCIF will provide the Associate with an itemized invoice for all costs incurred in shipping such copies to the Associate, and the Associate shall remit such costs to LCIF within 30 days after receipt of such invoice.

1.4 Annual Financial Statements: LCIF shall maintain complete and accurate records of its financial activities. LCIF shall:

- Prepare an annual report containing financial statements of its operations (which statements shall be prepared in accordance with generally acceptable accounting principles, consistently applied);
- Cause such financial statements to be audited by independent certified public accountants; and
- Distribute a copy of such annual report to the Associate within one month after its availability.

1.5 Mutual Cooperation: LCIF shall consult and cooperate with the Associate in the fulfillment of the purposes of this Agreement.

Section 2. Primary Undertakings of the Associate

2.1 Organizational Structure and Purposes: The Associate shall, at all times, be organized as a non-profit entity whose assets and revenues are committed perpetually to the development, implementation and furtherance of life skills programs for youth (in the Region or elsewhere).

2.2 Implementation of the Program in the Region: The Associate shall assume full responsibility for the effective and efficient implementation of the Program in the Region. Without limiting the generality of such responsibility, the Associate shall:

- Where appropriate, and in a manner consistent with Section 3 of this Agreement, sponsor translation, adaptation, modification and/or supplementation of Program materials so that the Program will be culturally and linguistically appropriate for implementation and use in the Region;
- Contract with competent and reputable publishers, or to otherwise arrange, for the publication or other reproduction of all Program curriculum and training materials, without cost or obligation to LCIF in sufficient quantities for distribution and use in connection with the implementation of the Program in the Region;
- Market the Program to appropriate school and community officials, and otherwise encourage and support use of the Program, within the Region;
- Sponsor workshops for the training of teachers for the Program following Lions Quest approved workshop models and conducted by Lions Quest certified trainers;
- Provide ongoing support and assistance to teachers who have been trained in the use of the Program; and
- Raise funding necessary to support the foregoing activities.

2.3 Compliance with International Implementation Guidelines: In connection with the implementation of the Program in the Region, the Associate agrees to comply with all provisions of Lion-Quest's International Implementation Guidelines (attached hereto as Exhibit A and has been previously incorporated herein by reference).

2.4 Financial Statements: The Associate shall maintain complete and accurate records of its financial activities. The Associate shall:

- On or before 15 January, and 15 July, provide LCIF with a written summary of workshop and material sales activity for the preceding calendar semester
- Promptly after the close of each fiscal year, cause the financial statements which will be included in its annual report to be audited by independent accountants who have a certification or other accreditation in the Region which is reasonable comparable to the certified public accountant designation for United States accountants; and
- Deliver a copy of each annual report, together with the accompanying audit report (in English), to LCIF within one month after its availability.

2.5 Mutual Cooperation: The Associate shall consult and cooperate with LCIF in the fulfillment of the purposes of this Agreement.

Section 3. Intellectual Property Rights

3.1 Ownership of Program Materials: The Associate expressly acknowledges that all rights, title and interest in and to the Program (including without limitation all products, services, trainings and materials used in conjunction with or associated with the Program except as stated in 3.2.5) is, and shall remain, the sole property of LCIF.

3.2 Translations, Adaptations, Modifications and Supplementations to program Materials: LCIF and the Associate anticipate that it may be necessary for the Associate to translate, adapt, modify and/or supplement Program materials in order to make the program culturally and linguistically appropriate for implementation and use in the Region. LCIF and the Associate further anticipate that any such supplemental materials may either be (1) derived from program materials provided by LCIF to the Associate pursuant to this Agreement or (2) original works created entirely by the Associate. With respect to all such translations, adaptations, modifications and supplementations (whether derived or original), LCIF and the Associate hereby agree that:

3.2.1 Responsibility for any such translation, adaptation, modification or supplementation shall rest solely with the Associate and shall not be a responsibility of LCIF;

3.2.2 No such translation, adaptation, modification or supplementation shall occur without (1) the written consent of LCIF to a specific, written proposal by the Associate prior to the commencement of such translation, adaptation, modification or supplementation (which consent shall not be unreasonably withheld or delayed) and (2) the written approval of LCIF to the end-product resulting from such translation, adaptation, modification or supplementation (which approval shall not be unreasonably withheld or delayed);

3.2.3 After approval by LCIF of the end-product of such translation, adaptation, modification or supplementation, all copies of such end-product shall be identified with the Lions Quest name, logo and other identifying trademarks in such manner as shall be reasonably required by LCIF;

3.2.4 All intellectual property rights associated with such translation, adaptation, modification or supplementation derived, either wholly or in any substantial portion, from program materials provided by LCIF to the Associate pursuant to this Agreement shall be the sole property of LCIF but shall be subject to the license granted by LCIF to the Associate under this Agreement. In connection therewith, the Associate hereby acknowledges and agrees that:

- All ideas, concepts, know-how, techniques, curricula and supplementary materials that are developed, during the term of this Agreement, by the Associate, its employees or any third-party retained by the Associate derived wholly or in part from materials provided by LCIF that shall constitute patentable subject matter or be susceptible to protection by trade secret law are hereby irrevocably assigned to LCIF by this Agreement effective upon creation, together with all patent rights with respect to such ideas, concepts, know-how, techniques, curricula and supplementary materials; and
- All materials developed, during the term of this Agreement, by the Associate, its employees or any third-party retained by the Associate derived wholly or in part from materials provided by LCIF that constitute copyrightable subject matter under the copyright laws of any country are hereby irrevocably assigned to LCIF by this Agreement effective upon creation, and LCIF shall have the exclusive right to copyright such works in its name and to secure any and all renewals and extensions of such copyrights throughout the world.

3.2.5 All intellectual property rights associated with such translation, adaptation, modification or supplementation which constitute original works created entirely by the Associate, but utilized in conjunction with the Lions Quest Program or marketed under the Lions Quest name, shall be the joint property of LCIF and the Associate. In connection therewith, the Associate hereby acknowledges and agrees that:

- All intellectual property rights associated with such original derivative works, both with regard to patentable subject matter and materials subject to copyrights within the Associate's home country shall reside with the Associate
- All intellectual property rights associated with such original derivative works, both with regard to patentable subject matter and materials subject to copyrights outside of the Associate's home country shall reside with LCIF and the Associate.

3.2.6 The Associate shall enter into such agreements with its employees and any third-parties retained by the Associate as maybe necessary to give effect to the provisions of this Section 3. LCIF shall be expressly designated as a third-party beneficiary of such agreements.

3.3 Annual Licensing Fee: The Associate shall pay LCIF an annual licensing and support fee as determined by the Lions Quest licensing formula for international country offices as described in Exhibit B and shall be updated by LCIF annually, attached hereto and made a part of this agreement. The fee shall correspond to the fiscal year beginning July 1 and ending June 30. The date(s) of payment shall be determined by mutual agreement by the parties, but the entire fee shall be paid no later than 30 days after the end of the fiscal year. Associates who feel that special conditions in their country merit a temporary reduction in the licensing fee may solicit special consideration from LCIF. All such requests should be submitted to LCIF in the first half of a fiscal year. LCIF shall consider all requests for special consideration and respond to the Associate within a period no greater than 60 days after receipt of the request.

Section 4. Term and Termination

4.1 Effective Date: This Agreement shall be effective as of the date set forth in the opening paragraph.

4.2 Termination: This Agreement shall be in effect from the date this agreement is signed and shall have no specific termination date. Either party may terminate this Agreement as of the last day of any calendar quarter provided that written notice of such party's intention to terminate this Agreement is delivered to the other party on or before the first day of such calendar quarter.

4.3 Obligations Which Survive Termination: Termination of this Agreement shall not affect (1) any obligations of the parties under Section 3 of this Agreement or (2) the Associate's obligations under Section 2.1 of this Agreement.

5.0 Governing Law: The validity, construction, and interpretation of this Agreement and the rights and duties of the parties hereto shall be governed by the laws of the Region without reference to Region's choice of law rule.

IN WITNESS WHEREOF, LCIF and the Associate have executed this Agreement, effective as of the date set forth in the opening paragraph.

Lions Clubs International Foundation

By: _____

Gary M. La Petina

Title: Executive Administrator

Date: _____

Lions Quest Organization/Country

By: _____

Title: _____

Date: _____

EXHIBIT B

Lions Quest License Fee Formula for International Country Offices

Below is the formula for the calculation of the licensing fee:

(size of economy) * (level of development) * (stage of implementation) * (number of programs) = **annual licensing fee**

size of economy – this factor is based on the national GNP and reflects the fact that larger economies present greater opportunities for program growth and can support larger obligations. In practical terms a value of 1000, 2000 or 3000 would be used in the formula based on the following:

- high: over \$500 billion = 3000
- medium: \$100 to \$500 billion = 2000
- low: under \$100 billion = 1000

level of development – infant mortality rate is used as a proxy for this variable, which reflects the fact that more developed countries can support larger payments. A value of 1, 2 or 3 is used in the formula based on the following:

- high: less than 15/1000 live births = 3
- medium: 15-35/1000 live births = 2
- low: more than 35/1000 live births = 1

stage of implementation – this factor reflects the fact that the capacity of a country to assume the costs of international support rises over time as the program grows. The following rating is used:

- pilot period = 0
- 1-3 years beyond pilot = 0.5
- 4-5 years beyond pilot = 1
- 6+ years beyond pilot = 1.5

note: this implies that nothing would be charged to programs during their pilot phase. Also, this factor can be adjusted by mutual agreement between LCIF and the Country Office when the level of activity is below expectations.

number of programs – it is viewed as appropriate that countries which utilize more of our programs should pay a greater share of the costs reflecting the greater benefit they receive. The following rating is used:

- 1 program = 1
- 2 programs = 1.25
- 3 programs = 1.5