|  | checklist Sponsorship Planning Meeting |
| --- | --- |
|  | PURPOSE  This tool helps you plan for your first meeting with your sponsor.  When to Use  Use this tool when preparing for the first meeting with a new sponsor.  Who Uses  Co-leads.  How to Use  Use the template to prepare for your meeting and to guide your conversations when meeting with your new sponsor. |
|  | |  |  | | --- | --- | | Getting Started | | | Attendees | | |  | **Welcome and introductions:** Sponsors, co-Leads, physician leader, team support person, and so on. | |  | **T-UBT orientation:** National Agreement, sponsorship, FMC Plan (handout). | |  | **Difference between T-UBTs and other UBTs:** Accountability, reporting, focus of work, goals, and metrics. | |  | **Team support:** Review team support plan (primary and backup); co-lead meetings, and so on. | |  | **Full staff involvement:** Review expectation that all staff are the team, versus just the meeting representatives (what that means and how it works). |  |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | | Team Specific Information | | | | | | | | | Department/Unit | | | | | | | | |  | | | | | | | | |  | **Team:** | New |  | **Meeting group:** |  | | | | Existing |  | |  | **Total employees in dept./unit:** | | |  | **NUCOA #s:** |  | | |  | **Sponsors:** Identify all sponsors, obtain contact information, review role and relationship with team. | | | | | | | |  | **Team membership:** Appropriate, representative of all, unions involved in selection, any gaps. | | | | | | | |  | **Co-leads:** Management | |  | | Labor | |  | |  | **Training needs:** | |  | | | | | |  | **Meeting schedule:** | |  | | | | | |  | **Team support agreement:** (For example, meetings cancelled without sufficient notice may result in the facilitator’s time recharged to the department.) | | | | | | | |  | **Does the team have a charter?** (If yes, obtain a copy.) | | | | | |  | |  | **Team successes:** | |  | | | | | |  | **Team challenges:** | |  | | | | | |  | **Focus areas, goals, targets, and metrics**: Sponsor discussion and agreement to help team to focus and prioritize their work. | | | | | | |  |  |  |  | | --- | --- | --- | | Action Items for Team's Next Steps | | | | What | Who | When | |  |  |  | |  |  |  | |  |  |  | |