|  | checklistSponsorship Planning Meeting |
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|  | PURPOSEThis tool helps you plan for your first meeting with your sponsor.When to UseUse this tool when preparing for the first meeting with a new sponsor.Who UsesCo-leads.How to UseUse the template to prepare for your meeting and to guide your conversations when meeting with your new sponsor. |
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| 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). |

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| Team Specific Information |
| Department/Unit  |
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|  | **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. |

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| Action Items for Team's Next Steps |
| What | Who | When |
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