



SPONSOR SUMMIT PLANNING GUIDE

BEFORE THE EVENT

	TASK	RESOURCES	ASSIGNED TO	DUE DATE
	Create your planning team 4 to 6 months ahead <ul style="list-style-type: none"> Decide on team members Schedule planning meeting(s) 	<ul style="list-style-type: none"> Include your key LMP partners Identify potential resources/partners outside of LMP, such as Public Affairs, HR, Learning, etc. 		
	Connect with your local LMP council, LMP leadership, regional LMP co-leads 4 to 6 months ahead <ul style="list-style-type: none"> Share your plan and needs Decide budget and how costs will be shared 	<ul style="list-style-type: none"> Sponsor support varies region to region; follow your regional structure Inform stakeholders such as members of regional or local LMP council, leaders in the Coalition of Kaiser Permanente Unions, and regional management 		
	Send save-the-date 4 to 6 months ahead <ul style="list-style-type: none"> Determine size of group (for room planning) Ensure selected date does not conflict with other events 	<ul style="list-style-type: none"> Consult the schedules of stakeholders Avoid holidays and other scheduled facility/region events Consider all shifts 		
	Find a location 4 to 6 months ahead <ul style="list-style-type: none"> Select and reserve a room large enough for the event Ensure participants have enough room to move around and participate in activities 			
	Capture the voice of the customer 3 to 4 months ahead <ul style="list-style-type: none"> Send an electronic survey to sponsors to best address needs Capture: <ul style="list-style-type: none"> » Items for training » Challenges and barriers » Ideas for speakers/topics/themes 	See Pre-Summit Sample Survey		
	Invite guests 3 months ahead <ul style="list-style-type: none"> Invite special guests to your event 	<ul style="list-style-type: none"> Invite leaders from Program Office, unions, the region and/or LMP council to deliver welcome or closing remarks Invite subject-matter experts such as attendance managers, workplace safety coordinators, care experience leaders to participate/ train your audience 		

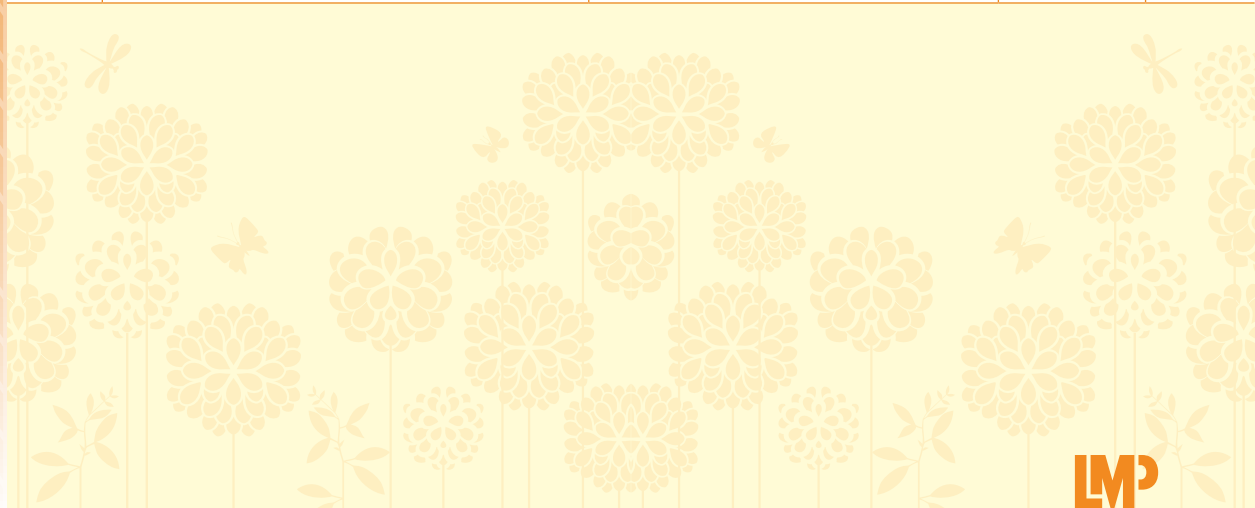




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BEFORE THE EVENT, *continued*

	TASK	RESOURCES	ASSIGNED TO	DUE DATE
	Create your agenda 2 to 3 months ahead <ul style="list-style-type: none"> Use results of the electronic survey to plan the agenda Be sure to connect the content of your event to the information in the UBT sponsor section of the National Agreement Include activities and action items Make plans for snacks and/or meals 	<ul style="list-style-type: none"> See the sponsor sample agendas Refer to the following pages of the 2015 National Agreement: <ul style="list-style-type: none"> » Page 10 (Section 1, no. 5 on UBT sponsorship) » Pages E.3 and E.4 (Exhibit 1.B.1.c.3 for expectations on the sponsors' role according to the Path to Performance) 		
	Select and confirm speakers 2 to 3 months ahead <ul style="list-style-type: none"> Send agenda to potential speakers Review with experts/speakers the time allotted for their sections Confirm participation 			
	Planning team and speaker production call 3 weeks ahead <ul style="list-style-type: none"> Review agenda Ensure a smooth transition from section to section 			
	Send a reminder to participants 2 weeks ahead			
	Planning meeting 2 weeks ahead Review logistics including: <ul style="list-style-type: none"> Prepare materials Reconfirm speakers Confirm room and food arrangements Do a dry run if possible 			





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THE DAY OF YOUR EVENT

	TASK	RESOURCES	ASSIGNED TO	DUE DATE
	Capturing your work Day of the summit <ul style="list-style-type: none"> Use flipcharts Take pictures of flipcharts or save and transcribe to share with group 			
	Keeping your group interested Day of the summit <ul style="list-style-type: none"> Provide activities that keep people from getting bored 	Visit the LMP website for a variety of icebreakers: LMPartnership.org/icebreakers		
	Model partnership Day of the summit <ul style="list-style-type: none"> Encourage sponsors to attend and present in partnership Use consensus decision making and interest-based problem solving 	Partnership behaviors: LMPartnership.org/tools/lmp-behaviors		
	Define action items and what happens next Day of the summit <ul style="list-style-type: none"> Sponsors should leave with clear next steps Gather feedback on next meeting, frequency, etc. 	Examples of action items: <ul style="list-style-type: none"> Communication planning on what they have learned at the event Create an action plan for UBT sponsor recruitment Debrief with corresponding LMP stakeholders 		
	Share resources Day of the summit <ul style="list-style-type: none"> Provide resources for sponsors 	Examples of resources: <ul style="list-style-type: none"> LMP website: LMPartnership.org/path-to-performance/toolkit/sponsorship Rutgers study: LMPartnership.org/tools/study-kps-high-performing-unit-based-teams LMP sponsor training: LMPartnership.org/learning-portal/effective-sponsorship <ul style="list-style-type: none"> » Include local and regional resources 		

AFTER YOUR EVENT

	Voice of the customer Immediately after the summit <ul style="list-style-type: none"> Send follow-up electronic survey to capture participants' feedback 	See Post-Summit Sample Survey		
	Debrief 2 to 4 weeks after the summit <ul style="list-style-type: none"> Debrief survey results and event with planning team 			



LEARNING