

DEI WORKSHOP

WORKBOOK

**USING SPONSORSHIP PROGRAMS
TO BUILD A TALENT PIPELINE**

THURSDAY, MARCH 10, 2022

Agenda

- 1:00 p.m. **Welcome and Introductions**
- 1:05 p.m. **Keynote by Ricardo Anzaldúa**
- 1:25 p.m. **Presentation: Freddie Mac SUMMIT program**
- 2:25 p.m. **Break**
- 2:30 p.m. to 3:50 p.m. **Breakout Sessions**
- 2:30 to 3:10 *Round One*
- *Roles and Responsibilities*
- *Customizing Your Sponsorship Program*
- *Operational Considerations*
- 3:10 to 3:50 *Round Two*
- *Customizing Your Sponsorship Program*
- *Operational Considerations*
- 3:50 p.m. **Sharing and Key Takeaways**
- 3:57 p.m. **Closing Remarks**
- 4:00 p.m. **Adjourn**

Common Steps: Designing and Implementing Your Program

1. Pre-Planning

- Decide on program goals
- Develop business case for funding and support
- Secure support and executive sponsorship

2. Create a Project Plan (resources, funding, timelines, dependencies and deliverables)

3. Design Program

- Identify desired leadership competencies
- Develop program eligibility, selection and matching processes
- Develop program rules and parameters (e.g., program length, size of cohort, exit rules, managers' roles, metrics, relationship milestones, identify program administrator(s), etc.)
- Create communication strategy (e.g., marketing, socialization, messaging, brown bags, etc.)
- Identify appropriate training, including identifying internal resources and/or outside vendors such as Sponsor and Participant best practices, training on competencies, etc.
- Develop program materials: application, participant and sponsor guides, development plan templates, FAQs, communication templates, operations guide, etc.

4. Announce and Promote the Program

5. Selection and Matching

6. Establish, Support and Monitor Sponsorship and Participant Relationships

- Development plans, program milestones, program events
- Training and coaching
- Develop and implement Action Learning project(s)

7. Program Evaluation, Metrics, Enhancement and Change Management including participant replacements

For Your Notes

Basic Roadmap: Before Launch

1 - Pre-Planning and Program Initiation

- Decide program goal(s)
- Build a business case for your program (What data do you have to support your case? What are other companies doing?)
- Secure Executive Sponsor(s)
- Develop a budget – estimates, funding sources
- Develop a project plan to identify milestones, dates, resources, dependencies, and deliverables to move the program forward
- Recruit champions
- Create an “elevator pitch”
- Build a communications plan – defines the type of messaging, audience, channel, frequency, timeline
- Identify key performance indicators (KPI) for developing metrics reporting. Consider what baseline data you need to help with measuring progress
- Build training curriculum and materials
- Develop program materials (application, participant and sponsor guides; development plan template; FAQs; communications templates; operations guide; etc.)

Basic Roadmap: Before Launch

2 – Program Design Decisions

- Set objectives and scope of the program (and how it fits into broader talent development programs)
- Who will be eligible? (e.g., tenure, performance, diverse attributes, etc.)
- What will the application process look like?
- How and who will you select applicants?
- What are the leadership competencies you want to promote?
- Will you have a curriculum or otherwise host formal events for program?
- How will you announce and market the program?
- Will you use a website to manage the application process as well as distribute program materials?
- Will you offer specific work project as “action learning” opportunities for participants?

Basic Roadmap: Before Launch

3 – Developing the Relationships

- How will sponsors be selected?
- How will the sponsors and participants be matched?
- How will they be trained on their roles and responsibilities?
- How will they be evaluated as sponsors and participants?
- Define the relationship events (e.g., getting to know each other, establishing individual goals, and milestone dates for training, get togethers, cohort meetings)
- What is role of the participant's manager?
- What is the exit process for participants who leave the program?
- How will sponsors and participants report on their efforts and progress to show accountability and commitment to the relationship?
- What is the estimated amount of time (each month) the participant is expected to work on sponsorship program related activities?

Basic Roadmap: After Launch

4 – Program Administration

- Periodically review/adjust administration of the program based on feedback
- Manage/report on budget – ongoing expenses, additional vendors or resources needed, etc.
- Monitor participation -- meet with participants and sponsors individually and in groups to ensure the pairings are meeting and making progress, coach as needed, get the training and resources needed, set up activities, remind pairings of milestone deliverables, evaluate or survey to get feedback, report on progress
- Develop and execute an ongoing communications plan – for participants and sponsors, stakeholders, business executives, etc.
- Develop program evaluation and metrics reporting (to convey successes and failures and identify process improvements)
- Establish report out schedule with Executive Sponsor(s) to share program progress, successes, and challenges
- Build “walking deck” to market program internally/externally

For Your Notes

For Your Notes

Breakout Session - Customizing Your Sponsorship Program

TOPIC	NOTES	QUESTIONS
Organizational Goals		
Organizational Needs		
Commitment/Support from the Top		
Size and Scalability		
Structure		
Organizational Culture		
SUMMARY:		

For Your Notes

Breakout Session - Operational Considerations

TOPIC	NOTES	QUESTIONS
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SUMMARY:		

Breakout Session - Operational Considerations

Next steps:

1. What did you learn today that you didn't know about sponsorship programs?
2. What is the business case for implementing a sponsorship program in your department? What would resonate with your management?
3. Identify 3 people who could act as potential or additional Executive Sponsors, to help drive success for your program.
4. Identify 3 people who can help you with the day-to-day development, implementation and/or improvement of your program.
5. What are the top 3 items you need to spend your time on when you look at the checklist?
6. What are the next steps you will take to drive this forward?
7. If you cannot do this immediately, is there an interim step you can do?

For Your Notes