# Sponsorship guidance toolkit: Checklist for a successful EOI process

## This checklist is designed to support you with setting up the EOI process for sponsors and sponsees.

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| EOI Process Item | Guidance |
| 1. EOI forms should be completed by both sponsees and sponsors | * Consistent EOI processes for sponsors and sponsees creates equality in the process from the start. * Forms must be released to both groups at the same time. * Sponsor EOIs provide data required for successful matching, including personal and professional motivations. * Sponsor EOIs also demonstrate a sponsor’s ability to invest time in sponsorship. |
| 2. EOI forms should be clearly structured and contain similar or corresponding criteria | * Ensure any personal information is collected and stored in line with your agency’s data protection requirements. These questions cover sensitive personal information. Personal information should not be retained once it is no longer required, and be disposed of appropriately.   Questions should cover the following areas:  **1. Identity and diversity information**  Collecting information on potential participants’ identity and diversity is not used to determine whether someone will be placed in the program. The main purpose of collecting the information is to support participant safety and belonging in the program.  It is also important to recognise that cultural diversity encompasses a broad range of experiences and identities. It is important to capture a diverse range of people and experiences, recognising that CALD people are not a monolith. Having a broadly worded question enables people to provide information which is important to them.  For sponsees, this includes cultural identities such as:   * CALD, NESB[[1]](#footnote-1) or CARM[[2]](#footnote-2) (reflecting the broadest range of current and past terminology used to include all CALD experiences) * Other languages spoken * Faith and religion * Ethnicity and race * Migrant, refugee or asylum seeker backgrounds * First or second generation * Other intersectional identities, including disability, LGBTIQA+, gender and carer * Any accessibility and/or adjustment needs * An open field for any other identity-based information participants want to share   For sponsors, this includes:   * CALD, NESB or CARM * Other intersectional identities, including disability, LGBTIQA+, gender and carer * An open field for any other identity-based information participants want to share   2. Subject matter experience, interests and expertise  The same questions can be used for sponsors and sponsees. These may include:   * Past and current functional work areas, e.g. procurement, policy, legal and governance * Areas of expertise or skills, e.g. facilitation, research, stakeholder relationships   3. Current level and future aspirations  For sponsees, this is important for understanding the starting point for sponsorship. This may include:   * Their current role and grade, including any recent above grade acting opportunities * Positions they hold external to NSW Government, e.g. community leadership roles * Future aspirations   For sponsors, this is relevant to understanding their level of influence and organisational power. Questions include:   * Their current role and senior executive band level * Other positions they hold, e.g. board and committee memberships   4. Career barriers and experiences of bias  These questions are for sponsees only and include:   * Past or current career barriers, including any career plateaus * Any experiences of bias relating to their CALD identity * Experience of racism in the workforce * Experiences of inclusion or exclusion in their workplace   5. Cultural and psychological safety  These questions are for sponsees only and include:   * What sponsees need to establish cultural safety with their sponsor. This could include having a sponsor with a similar cultural background (if possible) or gender * What sponsees need for psychological safety in the program   Cultural and psychological needs must be prioritised over other criteria. If these needs cannot be met, the sponsee is not suitable for the program.  6. Openness and willingness to be evaluated  The same questions can be used for sponsors and sponsees. These include:   * A commitment, openness, and willingness to be evaluated on individual progress on a regular basis * An openness and willingness to be measured on program outcomes on a regular basis   7. Demonstrated commitment to other learning or development programs  These questions ensure that sponsees and sponsors can prioritise time for learning and personal development.  The same questions can be used for sponsors and sponsees and cover any participation in:   * A longitudinal self-directed learning program * Coaching or mentoring * Additional study or capability uplift   8. Availability for the program  The same questions can be used for sponsors and sponsees and cover:   * Availability for key program dates * Capacity to engage in regular meetings with their sponsor/sponsee for the duration of the program * Willingness to prioritise the sponsorship relationship   9. Contact information and consent  Ensure you collect participants contact information and consent to share information with the EOI assessment team and matching panel. |
| 3. The EOI form parameters of first name, last name and other personal identifiers must be able to be de-identified | * MS Forms, Survey Monkey and other tools can help with EOI processes, including de-identification. * Limit the assigned staff to this task of receiving and downloading to 1-2 trusted leads. * Store information on a secure internal site with limited access to key staff. * Assessors should only see de-identified submissions. |
| 4. EOI forms should be accompanied by a communications plan and clear instructions for completion and submission | Attracting the right sponsors and sponsees requires a clear communications plan and strategic use of available communications channels. Engage your internal communications team for advice and support.  Important milestones in your communications plan include:  **1. Pre-release of EOI communications**   * If possible, leverage a senior program champion to send initial communications to your organisation. This could be your agency head or the program’s executive sponsor. * This communications piece should position the program within any other organisational change initiatives and your agency’s strategic plan. It should also highlight the rationale for the program and the importance of a diverse leadership cohort.   **2. EOI release**   * The EOI release should be shared across a variety of channels to reach senior leaders in your organisation and CALD employees of all levels. * Reiterate the key messages on why the program is being run, by whom, and what it hopes to achieve. * The EOI form must be accompanied with clear instructions on how to complete it, an indication of the time required to complete it, how to submit, and closing dates. * Ensure the EOI form is accessible, and candidates are aware of what supports are available and how they can request adjustments. * Consider providing more detailed information in written FAQs. This can also explain suitability for the program and what to expect after submission.   **3. EOI in progress**   * Provide reminders of the deadline mid-way through the EOI process. * Depending on the number of submissions being received, you may also need to extend the time available to complete EOIs to ensure you have a sufficient pool of candidates.   **4. EOIs closed and assessment in progress**   * Ensure the EOI closing date is clearly communicated to avoid disappointment. * Inform candidates on what the next steps are and estimated timeframes.   **5. EOI decisions**   * Consider how you will communicate the assessment outcome. * Communications with unsuccessful participants should demonstrate a high level of care as EOI questions include experiences of bias, and other personal information. Consider if your program champion or a senior leader can send these communications. |
| 5. EOI assessors should be briefed and ready when EOIs are released | Adequately prepared EOI assessors are critical to the objectivity and credibility of the program. To ensure you have the right assessors ready:   * Select, brief and block out time with a team of assessors prior to the launch of the EOI process. * This should include one lead assessor who is available to answer questions and review all EOI assessments for consistency. * Develop a clear timeline for assessments, with each EOI to be assessed by two assessors. * Include a strategy for dealing with any conflicts of interest. Despite using de-identified EOIs, given the depth of personal information collected it may still be possible for some applicants to be identified. Assessors should recuse themselves from assessing applications where there may be a conflict. * Recognise that EOIs share potentially triggering information about negative workplace experiences. Ensure you build in time to debrief with your assessors accordingly.   For more information on selecting assessors, see the Toolkit section on *EOI assessors, matching process and matching panel.* |

1. Non-English speaking background [↑](#footnote-ref-1)
2. Culturally and racially marginalised [↑](#footnote-ref-2)