

Supply Chain Education Checklist

Putting together an education plan should include a dedicated team of supply chain professionals as well as resources that are available to them through the general course of business. To ensure maximum effectiveness, designate a staff member to lead the effort and a committee to carry out the plan. The following can help you produce and deliver education that is relevant to specific stakeholders based on current industry issues that are confronting supply chain staff and customers (i.e., departments and service lines throughout the institution).



Perpetual Readiness Planning Tips

The need for education about a particular subject can pop up unexpectedly as the result of a major project with very little lead time, a new regulation, a new contract, etc. Your plan should be flexible enough to include an element of perpetual readiness so that any unanticipated needs can be addressed quickly. Here are some examples:

- Assign key roles for education plan ownership, including back-up lead(s) in case something arises while the primary lead is out of the office or is tied up on a major initiative.
- Build extra educational sessions into the calendar; they can be canceled if nothing pressing comes up.
- Schedule routine meetings with other key partners throughout the year to identify subjects to work into your plan based on hot topics that may impact workload, and in turn, the supply chain.

Obtaining Leadership Buy-in

- Meet with hospital leadership to explain the need for an official supply chain education plan. Start with executives who have shown an affinity for continuing education or who currently lead education efforts in another vertical; they may be able to serve as champions.
- Explain the breadth of new issues facing your department.
- Explain the potential risk to the institution (e.g., decreased production, ability to effectively negotiate, ability to interface effectively with other departments, etc.).
- Start small. Explain what your first session might look like. What would the topic be? Who would lead the session? Who would attend? Where would it be held?
- Quantify any costs that might be associated with the sessions, and if applicable, create an education budget. If money is not available currently, explain the ways in which the program can be implemented at no cost.
- Finish with your request for support and what that support looks like. For example, do you want the communications department to help you get the message out? Do you need executives to introduce the initiative to departments on your behalf or give you access to do so? Will there be any expenses associated with your plan? If so, provide an itemized budget for a six-month or one-year pilot.



Staffing Your Committee

- Appoint a supply chain education lead.
- Nominate Steering Committee members—look for people who have shown a willingness to learn, who have a positive work attitude, and where appropriate, specific expertise in a topic or category.
- Clearly communicate why the committee members were chosen, the committee goals, the expected monthly time requirement, and the requirement that everyone must participate in the educational sessions as an attendee but are not required to serve on the Steering Committee.
- Allow nominees to decline without ramifications and with a standing invitation to join the group if/when they are able to. This is a committee for those who appreciate the importance of the task, want to dedicate some time to making the program meaningful, and can fit it into their day-to-day work.
- Create a list of internal and external staff resources who are able to provide education on particular categories or topics (e.g., product-specific, department-specific, process-specific) and ask them if they are willing to participate on an as-needed basis. Most people want to help.
- Include your organization's education department (if applicable) in discussions at the outset and invite them to sit on your Steering Committee, as they will know best practices and have resources you may be able to share.

Creating Content

- Cull topics from your organization's high-level goals/strategic plan.
- Include content that is related to domestic and global economic developments or situations that will impact your business (e.g., taxes, tariffs, raw goods forecasts, natural disasters).
- Ask staff to submit topics that they would like to know more about.
- Engage key department leads with whom you can meet a couple of times a year so that their intelligence on industry challenges and trends can inform your education plan (e.g., finance, facilities, IT).
- Invite relevant departments to the educational sessions. If they are helping you build your content, offer to include them in sessions that may be useful to them. This helps foster a culture of continuous improvement, learning, and collaboration across the entire organization. When people feel included, they are more likely to offer topic suggestions.

Setting a Schedule

- Based on the number of topics and amount of time you are able to allocate to the educational program, decide on program frequency.
- Revisit this process at least once a year.

Assessing Effectiveness of Education

- Document sessions held and who delivered the session.
- Document feedback after each session (What resonated? What didn't? What needs to be explored more deeply? Which teaching methods or tools were most effective?)
- If there is an education budget, assess it on an annual basis.

Finally, present your successes to other departments, and give credit to those who made it happen. Colleagues may want to engage, so make it easy for them!