

**SCM Professionalisation Framework Project Charter**

**Template**

**Document Control**

Document Information

|  |  |
| --- | --- |
| **©** | **Information** |
| Document Id | *[Document Management System #]* |
| Document Owner | *[Owner Name]* |
| Issue Date | *[Date]* |
| Last Saved Date | *[Date]* |
| File Name | *[Name]* |

Document History

|  |  |  |
| --- | --- | --- |
| **Version** | **Issue Date** | **Changes** |
| *[1.0]* | *[Date]* | *[Section, Page(s) and Text Revised]* |
|  |  |  |
|  |  |  |
|  |  |  |

Document Approvals

|  |  |  |  |
| --- | --- | --- | --- |
| **Role** | **Name** | **Signature©** | **Date** |
| In-Country Representative |  |  |  |
| Sponsor |  |  |  |
| Project Coach© |  |  |  |
| Policy Working Group Lead |  |  |  |
| Education and Academia Working Group lead |  |  |  |
| Supply chain process Working Group lead |  |  |  |
| Technology Working Group Lead |  |  |  |
| HR Working Group Lead |  |  |  |
| Professional Association Working Group lead |  |  |  |
| Change Management Lead |  |  |  |

**Table of Contents**

[1 Executive Summary 2](#_Toc54514187)

[2 Project Definition 2](#_Toc54514188)

[2.1 Scope 4](#_Toc54514189)

[2.2 Deliverables 4](#_Toc54514190)

[3 Project Organisation 5](#_Toc54514191)

[3.1 Stakeholders 5](#_Toc54514192)

[3.2 Roles 5](#_Toc54514193)

[3.3 Responsibilities 5](#_Toc54514194)

[3.4 Structure 7](#_Toc54514195)

[4 Project Plan 8](#_Toc54514196)

[4.1 Overall Plan 8](#_Toc54514197)

[4.2 Resource Plan 8](#_Toc54514198)

[4.3 Financial Plan 10](#_Toc54514199)

[5 Project Considerations 10](#_Toc54514200)

[5.1 Risks 10](#_Toc54514201)

[5.2 Issues 11](#_Toc54514202)

[5.3 Assumptions 11](#_Toc54514203)

[5.4 Constraints 11](#_Toc54514204)

#

# Executive Summary

Sum up each of the sections in this document concisely by outlining the project:

* Definition
* Organisation and plan
* Risks and issues
* Assumptions and constraints. ©

# Project Definition

To better understand issues in the availability and use of SCM human resources in a country context, the USAID Global Health Supply Chain Programme-Procurement and Supply Management (GHSC-PSM) project, in conjunction with USAID and PtD, considers that a “whole of SCM labour market” approach provides a deeper and more holistic understanding of the SCM employment environment.

Whole of SCM labour marketrefers to the supply and demand for SCM labour in which employees are the supply and employers the demand in a specific country context. The country context includes urban, regional, and more remote environments and encompasses all the sectors where SCM technical personnel are employed in that country. Key stakeholders include government (ministries of labour, education, planning, and health, etc.), professional associations, academic institutions, private sector (resources industries, fast-moving goods, health, third-party logistics providers (3PL) and fourth-party logistics providers (4PL), etc.), and the humanitarian and development sectors.

In 2019 GHSC-PSM, in collaboration with PtD, SAPICS and USAID published a [SCM Professionalisation Framework](https://www.ghsupplychain.org/sites/default/files/2020-01/Comprehensive%20Workforce%20Systems%20Approach_GHSC-PSM_PtD_SAPICS.pdf) white paper outlining how a SCM professionalisation framework could be used by:

* Governments to define the professional standards of the profession
* Employers to articulate SCM competency requirements and career pathways in their organisations
* Institutions of learning to define clear learning and teaching courses
* SCM employees to map out a professional career in SCM

In 2020, the same consortium has worked together to complete the necessary elements of the ‘SCM professionalisation framework’. This framework has a ***‘Library of Competencies & Designations for Health Supply Chains’*** as its core meeting public and private sector needs. The competency framework then acts as the ‘standard’ to ensure an aligned ‘***Mapping of Education for Health Supply Chains*’** (supply) and **‘*Collection of Roles and Job Descriptions for Health Supply Chains*’** (demand), for a particular country context. Further, a **‘*Implementation Approach for Health Supply Chains’*** provides clear guidance on how to begin this journey of change. Figure 1 shows the interrelationship of these elements.

Although each of the SCM Professionalisation Framework components can be used by themselves it is believed that most benefit is obtained from using the **‘*Implementation Approach for Health Supply Chains’*** to create lasting systems change.



**Library of Competencies and Designations for Health Supply Chains**

Building on the PtD HSCM Competency Compendium (2014), this serviced based (non-cadre specific) framework presents seven competency domains that covers the practice of HSCM across the public and private sector Figure 1.This comprehensive framework provides ‘behaviour statements’ outlining workplace expectation in all listed competency domains and competency groups. This revised version provides a five-level maturity or designation classification for each competency area, acting as a ‘standard’ for comparing education requirements and related job descriptions.

**Collection of Roles and Job Descriptions for Health Supply Chains (Demand)**

Building on previous work conducted by PtD (2018), this tool provides a systematic way to build job descriptions and consider SCM roles with reference to the *Library of Competencies & Designations for Health Supply Chains.* An example set of SCM job descriptions and organisational charts are provided.

**Mapping of Education for Health Supply Chains (Supply)**

This tool provides an explanation of how an education and training framework should be considered within a country context, to align with SCM job roles. The tool also uses a machine learning approach to review existing SCM education and training opportunities to determine alignment with domains and levels within the *Library of Competencies & Designations for Health Supply Chains*.

**Implementation Approach for Health Supply Chains**

This tool provides and overview of the step by step activities that can be undertaken over a three-week period to engage local stakeholders advocating the need to implement a SCM Professionalisation approach. This methodology also validates a plan of action to apply the *Library of Competencies & Designations for Health Supply Chains,* *Collection of Roles and Job Descriptions for Health Supply Chains* and *Mapping of Education for Health Supply Chains* to systematically improve SCM professionalisation in the country context.

## Scope

Define the scope of the project in terms of the business:

* *Organisational* *areas* which will be affected
* *Locations* which will be impacted on
* *Process Areas which will change*

Where relevant, identify the related business areas which will not be affected as a result of this project.

## Deliverables

Highlight the key project deliverables in the following table (includes examples):

|  |  |  |
| --- | --- | --- |
| **Item** | **Components©** | **Description** |
|  |  |  |

#

# Project Organisation

Stakeholders

List the key stakeholders for this project. A ‘stakeholder’ is simply a person or entity outside of the project who has a key interest in the project Examples of stakeholders include:

* Legislative bodies
* Regulatory bodies.

Complete the following table (includes examples):

|  |  |
| --- | --- |
| **Stakeholder©** | **Interested in** |
| Government body | Compliance with legislation |
| Industry body | Compliance with codes of practice |
|  |  |
|  |  |
|  |  |

## Roles

Identify the roles required to undertake the project. Examples of typical roles include project:

* Sponsor
* In-country representative
* Coach
* Working Group Leads

For each role identified, list the resource likely to fill each role and his/her assignment details by completing the following table:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Role** | **Organisation©** | **Resource Name** | **Assignment Status** | **Assignment Date** |
| *Role* | *Organisation* | *Person* | *Unassigned / Assigned* | *xx/yy/zz* |
|  |  |  |  |  |
|  |  |  |  |  |

For larger projects with more than 10 resources, list only the key roles in the above table. Include a detailed listing and description of all roles within a separate *Resource Plan* document if required.

## Responsibilities

List the generic responsibilities for each role identified. A full list of the responsibilities, performance criteria and skills required should be documented within a separate *Job Description* for each project role.

**Project Sponsor**

This individual is a member of country leadership or organisational executive team. The sponsor works with the implementation team, typically assisting with matters such as funding, clarifying scope, monitoring progress, and influencing stakeholders in order to benefit the improvement programme. This individual performs the following activities:

* + - Reviews and approves recommended changes proposed by the implementation
		- Champions and initiates the professionalisation improvement programme
		- Obtains and maintains commitment to the implementation programme from the senior management team
		- Champions the implementation programme within all levels of the country and supply chain

**Project Manager**

The Project Manager ensures that the daily activities undertaken on the project are in accordance with the approved project plans. The Project Manager is responsible for ensuring that the project produces the required deliverables on time, within budgeted cost and at the level of quality outlined within the Quality Plan.

Key responsibilities include:

* Documenting the detailed Project Plan and Quality Plan
* Ensuring that all required resources are assigned to the project and clearly tasked
* Managing assigned resources according to the defined scope of the project
* Implementing the following project processes: time / cost / quality / change / risk / issue / procurement / communication / acceptance management
* Monitoring and reporting on project performance (re: schedule, cost, quality and risk)
* Ensuring compliance with the processes and standards outlined in the Quality Plan
* Reporting and escalating project risks and issues
* Managing project interdependencies
* Making adjustments to the detailed plan as necessary to provide a complete picture of the progress of the project at any time.

**Coach**

* The coach has the knowledge of the need for professionalisation, knowledge of the implementation approach and the professionalisation approach
* This individual will also act as the project lead and will be the primary support for the in-country representative. Much of the S1 process should occur before the coach arrives in country
* This individual would typically be external to the country or organisation where professionalisation is needed.

**In-country representative (ICR)**

* This individual is located within the country or organisation where implementation is being explored, this individual has a good knowledge of the power structures, stakeholders, and processes of government in-country. The ICR will facilitate the engagement of the coach with the decision-making stakeholders in-country.
* This individual would typically come from an organisation within the country, for example, the chairperson of the pharmaceutical council; the head pharmacist of the Ministry of Health or central medical stores; or an academic in pharmacy or supply chain management from an in-country academic institution

**Working Group Lead**

A Project Team member undertakes all tasks necessary to design, build and implement the final solution.

Key responsibilities include:

* Undertaking all tasks allocated by the Project Manager (as per the Project Plan)
* Reporting progress of the execution of tasks to the Project Manager on a frequent basis
* Maintaining all documentation relating to the execution of allocated tasks
* Escalating risks and issues to be resolved by the Project Manager. ©

## Structure

Depict the reporting lines between each of the key roles described above within a Project Organisation Chart. An example follows:

# Project Plan

The racetrack (Figure 2) is a high-level diagram describing the five phases necessary to complete a supply chain workforce improvement programme. The steps are as follows:

1. Advocacy
2. Define the Scope
3. HR4SCM Building Blocks
4. Improve
5. Implement and Monitor

The racetrack diagram denotes a linear progression path for project teams to follow, with each step and gate being completed before moving on to the next step, however workforce development and supply chain improvement is never fully completed therefore it is best conceived as a continuous cycle of workforce improvement projects.

Whilst the scope and objectives of an individual project’s initiatives may differ, the approach provides a configurable, standardised repository of workforce tools, templates, and best practices to guide improvement teams.

## Overall Plan

Provide a summarised plan outlining the sequence of each of the phases listed above.

**Milestones**

List the major project milestones and the required delivery dates. A ‘milestone’ is a significant event or stage to be completed. Explain why each milestone is critical to the project, as follows:

|  |  |  |
| --- | --- | --- |
| **Milestone** | **Date©** | **Description** |
| *Milestone Title* | *xx/yy/zz* | *Explain why milestone date is critical to business* |
|  |  |  |
|  |  |  |
|  |  |  |

**Dependencies**

List any project activities which:

* Will *impact on* another activity external to the project
* Will be *impacted on by* the non/delivery of another activity external to the project

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Project Activity** | **Impacts on** | **Impacted on by** | **Criticality©** | **Date** |
| *Planned Activity* | *External Activity* | *External Activity* | *Low/Medium/High* | *xx/yy/zz* |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |

## Resource Plan

Summarise the duration and effort required for each project team member, as follows:

|  |  |  |  |
| --- | --- | --- | --- |
| **Role** | **Start Date** | **End Date** | **% Effort** |
| *Project Role* | *xx/yy/zzzz* | *xx/yy/zzzz* | *xx/yy/zzzz* |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

A detailed Resource Plan will be drawn up during the “Planning” phase of this project.

## Financial Plan

Summarise the project budget approved (within the Business Case) as follows:

|  |  |  |
| --- | --- | --- |
| **Category** | **Cost©** | **Value** |
| People | * Salaries of project staff
* Contractors and outsourced parties
* Training courses
 | *$ x**$ x**$ x* |
| Advocacy | * Branding
* Advocacy materials
* PR and communications
 | *$ x**$ x**$ x* |
| Organisational | * Operational downtime
* Short-term loss in productivity
* Cultural change
 | *$ x**$ x**Describe* |
|  |  |  |
|  |  |  |

A detailed Financial Plan will be drawn up during the “Planning” phase of this project.

# Project Considerations

## Risks

Summarise the most apparent risks associated with the project. Risks are defined as “any event which may adversely affect the ability of the solution to produce the required deliverables.” Risks may be Strategic, Environmental, Financial, Operational, Technical, Industrial, Competitive or Customer related. Complete the following table:

|  |  |  |  |
| --- | --- | --- | --- |
| **Description** | **Likelihood** | **Impact©** | **Mitigating Actions** |
| Inability to recruit skilled resource | Low | Very High | Outsource project to a company with proven industry experience and appropriately skilled staff |
| Technology solution is unable to deliver required results | Medium | High | Complete a pilot project to prove the full technology solution |
| Additional capital expenditure may be required in addition to that approved | Medium | Medium | Maintain strict capital expenditure processes during the project |
|  |  |  |  |
|  |  |  |  |

To complete this section thoroughly, it may be necessary to undertake a formal Risk Assessment (by documenting a *Risk Management Plan*). To reduce the likelihood and impact of each risk's eventuating, clear ‘mitigating actions’ should be defined.

## Issues

Summarise the highest priority issues associated with the project. Issues are defined as“any event which currently adversely affects the ability of the solution to produce the required deliverables”. Complete the following table:

|  |  |  |
| --- | --- | --- |
| **Description©** | **Priority** | **Resolution Actions** |
| Required capital expenditure funds have not been budgeted | High | Request funding approval as part of this proposal |
| Required computer software is only at ‘beta’ phase and has not yet been released live | Medium | Design solution based on current software version and adapt changes to solution once the final version of the software has been released |
|  |  |  |
|  |  |  |

## Assumptions

List the major assumptions identified with the project to date. Examples include:

* There will be no legislative, business strategy or policy changes during this project
* Additional human resources will be available to support the project. ©

## Constraints

List the major constraints identified with the project to date. Examples include:

* The financial budget allocated is fixed and does not allow for over-spending
* There are limited technical resource available for the project