

## A Checklist for Your First Schwartz Rounds®

- Kick-Off Meeting:** Your Schwartz Rounds Leadership Team should participate in an Orientation Kick-Off Meeting with your Program Advisor to identify your team's goals, roles, and training needs.
- Complete Core Training:** Your Program Advisor will enroll your Leadership Team in the orientation courses on the Member Learning Center. Complete your courses before your next meeting with the Schwartz Center.
- Training Debrief Meeting:** Your Program Advisor debrief your training experience and introduce you to your Member Experience Advisor (MEA). Your MEA will be your ongoing contact with the Schwartz Center.
- Enroll in Additional Training (optional):** Introductory training on a variety of topics is available on our [Member Learning Center](#). Any member of your team can enroll in these trainings. These trainings are not mandatory.
- Select your Planning Committee:** Select a multidisciplinary, cross-functional Planning Committee, and send the team invites to ongoing meetings to prepare for and debrief Schwartz Rounds.
- Begin Planning Committee Meetings:** Use your first Planning Committee Meetings to describe Schwartz Rounds and set expectations for meeting agendas, objectives, and timelines. Use the [Sample Planning Committee Agenda](#) as a guide.
- Investigate CME/CEU Opportunities (optional):** Your organization may choose to provide Continuing Education credits for Schwartz Rounds and the [CME Toolkit](#) has information to support this effort.
- Choose the Date, Time, and Location of Your First Rounds:** Consider availability of your Leadership Team, Planning Committee, participants, and rooms/platforms. Consider an ongoing cadence for future Schwartz Rounds.
- Select the First Topic:** With your Planning Committee, select your first Schwartz Rounds topic.
- Select the First Panelists:** With your Planning Committee, select candidates for your first panel. Reach out to these panelists to determine availability and willingness to participate.
- Promote Your First Schwartz Rounds:** Ask members of the Planning Committee to support the promotion and marketing of the first Schwartz Rounds. Post physical and digital [flyers](#) and consider other strategies for getting the word out.
- Prepare Your Panelists:** Meet with your panelists to ensure they are prepared to share their experience in 2 to 5 minutes. Use [panel preparation questions](#) as a guide.
- Prepare Supportive Resources:** Organization-specific supportive resources may include peer support, EAP, mental/behavior health, pastoral care, and other relevant resources.
- Implementation Meeting:** Your Leadership Team will meet with your Member Experience Advisor to review your progress through this checklist and provide opportunities for additional training, resources, or support.
- Host Your First Schwartz Rounds:** We wish you the best of luck in your first Schwartz Rounds. Please do not forget to have the participants evaluate their experience using an evaluation tool.
- Log Your Schwartz Rounds:** Use [this link to log your Schwartz Rounds](#). Be prepared to share the date, title, facilitator name(s), and number of participants.
- Share Your Evaluation Summary:** Please send a summary of your evaluation results to [rounds@theschwartzcenter.org](mailto:rounds@theschwartzcenter.org).

We hope that you find this checklist supportive as you prepare for your first Schwartz Rounds. Every organization is different, and your planning process may include additional steps. Your Member Experience Advisor and our [Member Community Website](#) are your go-to resources for any questions that arise as you prepare for Schwartz Rounds. We look forward to supporting you as you continue your Schwartz Rounds journey.