



**SMI Spring 2026 Forum**

# From Insights to Action: Moving Healthcare Forward

**April  
28-30**

**THE WESTIN DALLAS  
STONEBRIAR RESORT  
FRISCO, TX**



# Tuesday, April 28

3:00 PM CT

**Registration Opens**

4:30 PM -  
5:30 PM CT

**New Member/First Timer Reception (by invitation only)**

4:30 PM -  
5:30 PM CT

**AWL Mentee Reception (AWL MENTEES by invitation only)**

5:30 PM -  
7:30 PM CT

### Welcome Reception

Join us under the big Texas sky for networking as we kick off the Forum. Reconnect with colleagues, catch up with friends, and meet new SMI members and special guests. This event will be held outdoors on the Garden Terrace, and the attire is business casual.

# Wednesday, April 29

7:00 AM -  
7:50 AM CT

**Breakfast**

8:00 AM -  
8:30 AM CT

### General Session

**Welcome & SMI Update**



LISA HOHMAN

CEO



JANE PLEASANTS

PRESIDENT





8:30 AM – 9:30 AM CT

BACK BY POPULAR DEMAND!

Filtering the Noise Part 2: Yes, We Are Still In Chaos

Chaos didn't end in 2025. It evolved. In 2026, healthcare supply chain leaders are navigating persistent geopolitical tension, regulatory whiplash, margin compression, AI acceleration, and a permanently altered cost structure. The disruption is constant. Back by popular demand, Ford Koles will deliver a 2026 state-of-the-industry briefing focused on what healthcare leaders must understand now, what's coming next, and how to build clarity, resilience, and competitive advantage in an environment that refuses to stabilize. This session will include a panel discussion of SMI members facilitated by Ford and Table Talk.



FORD KOLES
FOUNDER & CEO



9:30 AM – 10:00 AM CT

Networking Break

10:00 AM – 10:45 AM CT

Panel Discussion Hosted by Ford Koles with:



TOM POLEN
CHAIRMAN, CEO AND PRESIDENT



STEVE MASON
CHIEF EXECUTIVE OFFICER, MEDICAL SEGMENT



STEVE DOWNEY
CHIEF SUPPLY CHAIN & SUPPORT SERVICES OFFICER





11:00 AM –  
12:00 PM CT

## SMI2U Workshops – Round 1

### Workshop #1 SCORE Value Language™: A Framework for Executive Influence

**Topic: Leadership**

Strategic initiatives often stall not because the strategy is flawed, but because value messaging does not align with stakeholder priorities. This session introduces the SCORE Value Language™ framework—Strategic, Clinical, Operational, Relationship, and Economic—and provides a structured method for diagnosing and adapting to executive decision drivers. Participants will apply the framework to common leadership scenarios, including capital investment and resource allocation.

#### Key Learnings:

- Identify the five Languages of Value
- Align messaging to stakeholder priorities
- Reduce friction in complex decision environments



JOE WALSH

FOUNDER



JEROMIE ATKINSON

CHIEF SUPPLY CHAIN  
OFFICER



## Workshop #2 From Risk to Resilience: Supply Chain Solutions to 2026's Top Patient Safety/Health Technology Hazards

### Topic: Resiliency

As health technology and patient safety risks grow more complex, supply chain leaders play a defining role in enterprise risk management and organizational resilience. This workshop examines key insights from ECRI's Top 10 Health Technology Hazards and Patient Safety Concerns for 2026, exploring how supply chain decisions influence risk exposure and mitigation. Small-group discussion will focus on governance, preparedness, and cross-functional alignment.

#### Key Learnings:

- Analyze supply chain touchpoints tied to emerging risks
- Identify cross-functional mitigation strategies
- Exchange leading practices to reduce exposure and strengthen system-wide resilience



SHANNON KOOKER

EXECUTIVE DIRECTOR  
TOTAL SYSTEMS SAFETY



SCOTT LUCAS

VICE PRESIDENT DEVICE  
SAFETY



ERIC TRITCH

SR. VICE PRESIDENT OF  
SUPPLY CHAIN & SUPPORT  
SERVICES AND CHIEF  
SUPPLY CHAIN OFFICER



DAVID DAVIS, MBA

VICE PRESIDENT OF  
SUPPLY CHAIN



## Workshop #3 Collaboration in Action: Turning Everyday Partnerships into Long - Term Success

Topic: Collaboration



Sustained performance requires partnerships grounded in governance, transparency, and shared accountability. This session examines two Tom Hughes Collaboration Award Nominations—Cleveland Clinic + Clarium and Stanford Medicine + Becton, Dickinson and Company—where collaboration evolved beyond contracting into enterprise alignment. Discussion will focus on structural enablers, executive sponsorship, and the role of shared data in driving long-term value.

### Key Learnings

- Examine governance models that support alignment
- Evaluate the role of executive sponsorship in collaboration
- Assess how data transparency strengthens partnerships
- Identify drivers of sustained enterprise value in partnerships

### Facilitators



JIM FRANCIS

CHAIR, SUPPLY CHAIN MANAGEMENT



ERIC O'DAFFER

INDUSTRY EXPERT



### Speakers



SARAH CHARAI

EXECUTIVE DIRECTOR OF SUPPLY CHAIN OPERATIONS



STEVE LIOU

CHIEF EXECUTIVE OFFICER



AMANDA CHAWLA

SVP CHIEF SUPPLY CHAIN AND POST ACUTE CARE OFFICER



SREE DUGGINENI

VP STRATEGIC SOURCING AND SUPPLIER RELATIONS



JOHN HALSEY

STRATEGIC CUSTOMER VICE PRESIDENT



## Workshop #4 AI in Practice: Applied Use Cases in Healthcare Supply Chain

### Topic: AI

Artificial intelligence is transitioning from experimentation to operational application. This session features two use cases demonstrating how organizations are applying AI to improve recall management and supply chain visibility. Participants will engage in guided discussion focused on implementation considerations and future opportunities.

### Key Learnings

- Review applied AI solutions in healthcare supply chain
- Understand implementation challenges and lessons learned
- Explore emerging use cases
- Identify considerations for responsible adoption

### Facilitator



KEITH LOHKAMP

VICE PRESIDENT,  
PRODUCT MANAGEMENT



### Speakers



GUILLERMO M. RAMAS

HEALTHCARE TECHNOLOGY  
EXECUTIVE



MICHELLE  
KOSOVEC



STEVE JACKSON

CHIEF REVENUE  
OFFICER



JAROD OTTO

DIRECTOR OF INFORMATICS  
& STRATEGIC OPERATIONS





SMI SPRING 2026 FORUM

FROM INSIGHTS TO ACTION:  
MOVING HEALTHCARE FORWARD

## Workshop #5 Strengthening End-to-End Supply Chain Collaboration

Topic: Transparency

Limited visibility across providers, manufacturers, and distributors continues to create inefficiency and risk. In this collaborative workshop, leaders from each sector will outline current challenges and engage participants in identifying practical solutions. The discussion will explore global visibility, process alignment, and shared accountability.

### Key Learnings

#### Facilitator



KEVIN NELSON

INDUSTRY EXPERT



TOM HARVIEUX

SVP & CHIEF SUPPLY CHAIN OFFICER, SMI BOARD MEMBER



JOSH WOLFE

SVP INVENTORY MANAGEMENT



MICHAEL FRANKEN

SVP GLOBAL SUPPLY CHAIN



BETSY WORMET

CHIEF COMMERCIAL OFFICER



12:00 PM -  
1:00 PM CT

Lunch & Networking



**SMI SPRING 2026 FORUM**

**FROM INSIGHTS TO ACTION:  
MOVING HEALTHCARE FORWARD**



**1:00 PM –  
2:30 PM CT**

### **Candid Conversations: Real Issues | Real Solutions**

Designed by the SMI Forum Advisory Group, these small breakout sessions are laser-focused on the topics you are facing every day — with more intentional engagement to ensure balanced perspectives and meaningful conversation.

This facilitated, small-group dialogue brings providers and industry partners together as peers to explore timely, shared challenges. The focus is candid insight mutual understanding, and practical learning centered on the issues that matter most right now. EACH TABLE WILL INCLUDE A PROVIDER FACILITATOR TO HELP GUIDE THE CONVERSATION AND ENSURE EVERY VOICE IS HEARD.

Don't miss this opportunity to be part of the conversation shaping what's next.

**2:30 PM –  
3:00 PM CT**

### **Networking Break**



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3:00 PM-  
5:00 PM CT

Thought Leadership Council Meetings with co-chairs



Clinical Integration

The Clinical Integration Council works to lead the industry to an effective and sustainable integration relationship between the supply chain, clinical teams, and physician supply chain leaders.



AARATHI CHOLKERI-SINGH,  
MD, FACOG

EXECUTIVE DIRECTOR &  
CHIEF MEDICAL OFFICER



GINGER SHARP

VICE PRESIDENT AND CHIEF  
SUPPLY CHAIN OFFICER



Supply Chain  
Community  
Impact

The Supply Chain Community Impact Council works to identify and promote effective strategies that foster a culture of access and belonging within our Supply Chains to positively impact the communities we serve.



VALENCIA  
STOUDAMIRE, MPA

VICE PRESIDENT, STRATEGIC SUPPLIER  
ENGAGEMENT & COMMUNITY BENEFIT  
REPORTING



DARYL STILLEY

VICE PRESIDENT,  
GPO STRATEGY HEALTHCARE  
& SENIORS





**Intelligent Supply Chain**

The Intelligent Supply Chain Council works to accelerate the creation and adoption of best practices that enhance efficiency, optimize workflows, and create tangible lasting value across the industry in serving our patients, community, and constituents.



**JAY KIRKPATRICK**  
VICE PRESIDENT, SUPPLY CHAIN OPERATIONS



**NEW** **KEITH LOHKAMP**  
VICE PRESIDENT, PRODUCT MANAGEMENT FOR SUPPLY CHAIN MANAGEMENT FOR HEALTHCARE



**Key Strategic Collaboration**

The Key Strategic Collaboration Council works to build upon and expand SMI'S commitment to leading and modeling collaborative relationships between trading partners.



**JIM FRANCIS**  
CHAIR, SUPPLY CHAIN MANAGEMENT



**MATT BRANDT**  
CEO & FOUNDER





6:15 PM CT

**Buses to COSM begin departing Westin Stonebriar**

6:30 PM –  
9:30 PM CT

### **SMI Dinner Event at COSM**



**BACK BY POPULAR DEMAND!**

We will be returning to COSM! Step into the action with COSM’s groundbreaking, dynamic virtual reality world while networking and making meaningful connections with your peers. The excitement continues both inside COSM and outside on the patio, where you’ll take in stunning city views as the energy carries on.



# Thursday, April 30

7:00 AM -  
8:30 AM CT

Breakfast/Luggage Storage

8:30 AM -  
9:30 AM ET

## SMI2U Workshops – Round 2

### Workshop #1 SCORE Value Language™: A Framework for Executive Influence

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FOUNDER



JEROMIE ATKINSON

CHIEF SUPPLY CHAIN OFFICER



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DAVID DAVIS, MBA

VICE PRESIDENT OF SUPPLY  
CHAIN



## Workshop #3 Collaboration in Action: Turning Everyday Partnerships into Long-Term Success

**Topic: Collaboration**



Sustained performance requires partnerships grounded in governance, transparency, and shared accountability. This session examines two Tom Hughes Collaboration Award Nominations—Cleveland Clinic + Clarium and Stanford Medicine + Becton, Dickinson and Company—where collaboration evolved beyond contracting into enterprise alignment. Discussion will focus on structural enablers, executive sponsorship, and the role of shared data in driving long-term value.

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CHAIR, SUPPLY CHAIN MANAGEMENT



**ERIC O'DAFFER**

INDUSTRY EXPERT



### Speakers



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EXECUTIVE DIRECTOR OF SUPPLY CHAIN OPERATIONS



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VP, STRATEGIC SOURCING AND SUPPLIER RELATIONS



**JOHN HALSEY**

STRATEGIC CUSTOMER VICE PRESIDENT





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JAROD OTTO

DIRECTOR OF INFORMATICS  
& STRATEGIC OPERATIONS



## Workshop #5 Building End-to-End Visibility Across the Healthcare Supply Chain

### Topic: Transparency

Limited visibility across providers, manufacturers, and distributors continues to create inefficiency and risk. In this collaborative workshop, leaders from each sector will outline current challenges and engage participants in identifying practical solutions. The discussion will explore global visibility, process alignment, and shared accountability.

### Key Learnings

- Identify visibility gaps across stakeholder touchpoints
- Explore opportunities to improve data transparency
- Discuss cross-partner coordination strategies
- Outline actionable next steps

### Facilitator



KEVIN NELSON

SENIOR OPERATING  
PARTNER AND ADVISORY  
BOARD MEMBER

### Speakers



TOM HARVIEUX

CHIEF SUPPLY CHAIN  
OFFICER



JOSH WOLFE

SVP INVENTORY  
MANAGEMENT



MICHAEL FRANKEN

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BETSY WORMET

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OFFICER





## SMI SPRING 2026 FORUM

# FROM INSIGHTS TO ACTION: MOVING HEALTHCARE FORWARD

9:30 AM –  
10:00 AM CT

### Networking Break

10:00 AM –  
11:00 AM CT

### SMI Spotlight

Get an inside look at what's new at SMI! Hear directly from SMI Members as they unveil innovative tools and programs – including a Special Summer Event, physician-led initiatives, our Center of Excellence, and the launch of an exciting new Leadership Podcast series.

11:00 AM –  
11:45 AM CT



Where Ideas Ignite

### BACK BY POPULAR DEMAND!

### Industry Innovations, Inspirations and Actions: 10-minute future forward TED talks



Back by popular demand—get ready for an unforgettable closing session featuring three dynamic TED-style Talks from SMI members.

Experience the passion and insight of Tina, Emily, and Martin as they take the stage to share bold innovations, fresh inspiration, and actionable ideas for the SMI community. Each powerful 10-minute talk is designed to spark new thinking and deliver takeaways you can put into action.

**These are the talks everyone will be buzzing about—don't miss them!**



TINA MURPHY

PRESIDENT  
& CEO



EMILY GALLO

SENIOR VICE PRESIDENT &  
GENERAL MANAGER



MARTIN MARSHALL

UTSouthwestern  
Medical Center

11:45 AM –  
12:00 AM CT

### Forum Adjournment