PM827: Strategic Management of Healthcare Organizations

Spring 2018
4 Credits
Wednesdays 6-8:50 pm, L-303, Instructional Building

Instructor information

Prof. Lynn Garvin
lagarvin@bu.edu
Talbot 342 West
Please email for appointment

Teaching assistant

Caitlin Manca
caitlin.murphy20@gmail.com
Please email for appointment

Course description

This course is designed to make the student aware of well-established and innovative best practices that are necessary for making strategic decisions in the competitive environment of health care. Each session offers an opportunity to explore various aspects of formulating, monitoring, and leading strategies while considering the complexity of the structure and processes in healthcare. Real-life projects engage the student in making evidence based and value driven decisions while being cognizant of culture, regulations and the dynamic nature of the industry. Discussions from the readings, case studies and assignments focus on developing systems thinking and strategic intuition that is vigilant of the drivers of change, leadership skills and countermeasures by competitors.

Course learning objectives

Upon completion of this course, students will be able to:

1. Apply general business strategy concepts as they relate to the health care industry.
2. Analyze market opportunities and challenges for purposes of formulating strategies.
3. Operationalize analytical frameworks using strategic decision-making tools to address issues faced by healthcare organizations.
4. Critically assess organizational assumptions about uncertainty, threats and opportunities.
5. Creatively strategize small solutions to address healthcare concerns.
6. Develop a robust strategic plan in a healthcare organization using systems thinking and evidence.
7. Practice case base interview techniques.
8. Apply practical news and healthcare knowledge at a macro-level using systems thinking.
9. Use economic, financial and demographic data to make informed managerial decisions.
10. Critically analyze competitors and market situations to create unique opportunities.
11. Considers various service categories in the internal and external environment that affect market value.
12. Summarize the challenges faced during strategic redesign of organizations.

13. Professionally present assignment reports and presentations to senior management.
14. Develop a professional report on strategic consulting project.
15. Strengthen oral communication through individual and team based presentations.
16. Enhance self-management skills by working on a live project.
17. Gain experience in creation, development and consulting for a real, practice based strategic management project.
18. Practice effective collaboration and team functions during discussions and interactions through class activities and live project.
19. Develop a strategic planning retreat agenda, budget and class-based activity

Disclaimer

This syllabus represents my current plans and objectives. As we go through the semester those plans may need to change to enhance the class learning opportunity. Such changes, communicated clearly, are not unusual and should be expected. Version updates will always be indicated by the Date at the bottom of the syllabus page.

Learning resources

Required textbook
- Moseley, George B, Managing Health Care Business Strategy, 2nd Edition (2017) ISBN-13: 978-1284081107

Recommended textbooks, software, materials
- Cosentino, Marc. Case in point. Burgee Press, 2016. ISBN: 9780986370717

Blackboard: http://learn.bu.edu

Online modules/resources
- 4 cases + 2 notes for the course (see case list below):
  http://cb.hbsp.harvard.edu/cbmp/access/72483480
    o Michael E. Porter; Elizabeth Olmsted Teisberg (2016). Cleveland Clinic: Growth Strategy 2015. Harvard Business School, Product 9-709-473-PDF-ENG
    o Amy Madore; Julie Rosenberg; Rebecca Weintraub (2017). Project ECHO: Expanding the Capacity of Primary Care Providers to Address Complex Conditions, Harvard Medical School/Brigham and Women's Hospital. GHD-036
    o Akhilesh S. Pathipati; Mary K. Bundorf (2017). Massachusetts Eye and Ear: Deciding Whether to Join Partners HealthCare. P92-PDF-ENG
    o Nancy M. Kane (2017) Humana's Bold Goal: 20 Percent Healthier by 2020. Harvard T.T. Chan School of Public Health. Product: PH6-015

Assessments

It's Elementary: A simple, focused presentation designed to increase our knowledge about the corporate world in healthcare. Based on the topic identified by the instructor during the first class session, each student will present using the **Ignite style** (Please refer to http://sixminutes.dlugan.com/ignite-presentations/). The presentation topic will be assigned in the first week of class. Please note that you must follow the format or you will lose points. Please find assessment rubric in Assessment Guidelines, Appendix B.

Strategic Planning Retreat: It is time for your hospital to renew its 5-year strategic plan. Your CEO has tasked you to be the organizers of a strategic planning retreat that will set the foundation for your hospital's next strategic planning cycle. The main point of this retreat is to focus on strategic planning and setting the priorities for the next 5 years. The management retreat is meant to include all senior- and mid-level management (no staff-level participants) and be held for 1 full day (don't forget that people like to eat well and be entertained during these retreats!). You have a budget of $25,000 to cover all expenses and you're expected to use all of it.

Your group's objectives are to develop a 25-minute in-class presentation that encompasses the following: (1) introduction to the hospital (e.g., are you an academic medical center, etc.) and the key pressures facing your hospital (you can make up a hospital or use an existing one), (2) prepare a detailed, 1-page agenda for the 1-day strategic planning retreat, (3) prepare a detailed, 1-page budget by line item for all expenses you expect to incur during the retreat, (4) lead the class in a strategic planning activity that is part of the agenda you created, and (5) summarize the results of your in-class activity and discuss how you can use them to address the challenges facing the hospital set forth in your introduction. Examples of strategic planning activities may include: SWOT analysis development, breakout groups focused on growing specific services, etc. However, you are **strongly** encouraged to be creative in developing your own activity. **Topics must be substantially different from week-to-week. In other words, if Group 1 performs a SWOT analysis on a health system, Groups 2-6 should NOT propose an exercise using a SWOT analysis.** Topics will be approved by the instructor prior the week prior to the presentation.

Please remember to include a thorough introduction to your organization that provides enough detail so the class understands the organizational setting (including any key external or competitive issues facing the hospital) and allow time for a short wrap-up/conclusion. The conclusion should synthesize the learnings from the class activity.

Individuals will self-select into groups based on the preferred date of presentation. The teams can (and should) be different from the SCP project groups, although some overlap may certainly occur. Class activity topics, and a draft of your retreat agenda, should be cleared with the course instructor **approximately 1 week prior to the date of your group's presentation**. The grading rubric for the presenting team is attached (Appendix C).

Class Participation: While some of the material in this class will be new to all students, there will be elements that students have encountered before. To accommodate this, there will be some lecture/reading to introduce concepts; however, there will be a greater emphasis on discussion to explore the material. The theory becomes much more real when considered in context and from many angles.

Please refer to Assessment Guidelines – Class Participation for more details.

Written Case Analyses: One of the best ways to learn the quantitative tools discussed in this course is through practice. Four cases relevant to strategy will be discussed in class during the semester. The case should be analyzed using the questions developed. The grading rubric is attached (Appendix A). The written case analysis is to be submitted online prior to the start of the class where we will discuss the case. You are expected to be prepared for the discussion and completing your case analysis prior to class will aid in that preparation. You must submit three (3) cases of the four cases discussed in class.

SCP Submissions: This is the most crucial part of the course. For the purpose of this assignment, the class will be divided into teams. Each team will consult with an organization on a strategy project. The SCP will allow you to practice applying the concepts of strategic management and its tools taught in the class. Course content will assist you in the successful completion of this project. The team will also be responsible for completing the requirements of the sponsor. Some helpful templates and documents to assist in the development of SCP have been included on BlackBoard. However, not all these materials will be germane to your project, and in some cases you may need to include elements for your project that are not on the BlackBoard site. In most class sessions, approximately 45 minutes (typically at the end of the session) will be allotted for groups to meet. The structure and flow of the assignments below are meant to help you make progress and provide structure for you to arrive at a strong, comprehensive and implementable set of recommendations for your client.

Team charters will be discussed and completed in the second week of class. This will assist in addressing any concerns teams may have about their organization, decision-making or purpose. Brief description of assessment 2.

Please refer to Assessment Guidelines – Strategic Consulting Project for further details.

Grading policy

Course Grade Percentage Breakdown:
It's elementary (10%)
Strategic planning retreat agenda, budget and in-class activity (10%)
Class participation (15%)
Written case study analyses (15%)
SCP submissions (50%)

Course policies and student expectations
Make-up work policy: Approximately one week turnaround AFTER FINAL DATE of submission. Students may Revise and Resubmit a SCP or case study assignment ONLY ONCE within one week after feedback is provided to improve their grade. Resubmissions of the SCP final presentation and final report are not permitted.

Attendance and/or participation policy: Since much of the learning in this course is experiential, you must be in class to experience it. If you are not in class, you cannot participate; thus, any more than 2 unexcused absences will result in a reduction in the class participation component of the grade (3-4%), and may endanger your ability to complete the course.

Course preparation: Course Prerequisites and Curriculum Context: PM702 or PH719 and since this is a capstone course some other healthcare management courses such as Health Economics, Finance/Accounting if taken will be helpful.

Boston University School of Public Health: Standards of Academic Honesty
Students in the School of Public Health are expected to adhere to the highest standards of academic honesty. Academic honesty is essential for students to attain the competencies the School expects of its

graduates and to enable the faculty to adequately assess student performance. Any action by a student that subverts these goals seriously undermines the integrity of the educational programs of the School.

Academic misconduct is any intentional act or omission by a student which misrepresents his or her academic achievements, or any attempt to misrepresent his or her academic achievements. The following acts constitute academic misconduct. This is not an exhaustive list.

- *Cheating on examinations:* The use or attempted use of any unauthorized books, notes or other materials in order to enhance the student's performance in the examination, copying or attempting to copy from another student's examination, permitting another student to copy from an examination or otherwise assisting another student during an examination, or any other violation of the examination's stated or commonly understood ground rules.
- *Plagiarism:* Any representation of the work of another as one's own constitutes plagiarism. This includes copying or substantially restating the work of another person without the use of quotation marks or other indication that the words of another have been copied, the use of any written or oral work from which the student has obtained ideas or data without citing the source, or collaborating with another person in an academic endeavor without acknowledging that person's contribution.
- *Submitting the same work in more than one course without the consent of all the instructors*
- *Misrepresentation or falsification of data*
- *Allowing another student to represent your work as his or her own*
- *Violating the rules of an examination or assignment*

A student who is found guilty of academic misconduct may be subject to disciplinary action, up to and including dismissal from the School. For more details, please review the full policy.

Be sure to complete the plagiarism tutorial and review tips for avoiding academic dishonesty.

Course Schedule

Session	Date	Topic	Assignments Due
1	Jan. 24	Introduction to Strategy	Elevator Pitch SCP Assignment #1 (1/31 @ 11:59pm)
2	Jan. 31	Strategic Thinking, Leadership and Competitive Advantage	Contact Project Sponsor (no later than 5pm on Friday, 2/2)
3	Feb. 7	Strategic Assessment of the Internal Environment Part 1	SCP Assignment #2 (extension Feb 9)
4	Feb. 14	Strategic Assessment of the Internal Environment Part 2	SCP Assignment #3 Case study 1 analysis due
5	Feb. 21	Strategic Assessment of the External Environment	

Session	Date	Topic	Assignments Due
6	Feb. 28	International Strategy and Globalization	Case study 2 analysis due
	Mar. 7	No Classes – Spring Break	
7	Mar. 14	Entrepreneurship and Building Great Organizations	Self-evaluation Team Feedback
8	Mar. 21	Mergers, Alliances and Acquisitions	SCP Assignment #4 Case study 3 analysis due
9	Mar. 28	Disruption / Business Model Innovation	Case study 4 analysis due
10	April 4	Ethics in the strategy market and big data	
11	April 11	Horizontal and Vertical Integration	SCP Assignment #5
	April 18	*No Class – Substitute Monday Schedule of Classes*	
12	April 25	Implementation / Change / Capacity Building	
13	May 2	Final Presentations of SCP report	SCP #6: Final presentation SCP #7: Final Report **Due on May 6**
14	May 9	Strategy, Healthcare and its (our) Future	

Session outline

Learning Objectives	Readings and Pre-Class Activities	Class Notes
Session 1: Introduction to Strategy (January 24)		
•Describe the objectives and structure of the course •Define 'strategy' and describe its key dimensions •Explain the evolution of strategy management, with a focus on healthcare •Introduction to a case-based interview •Identify the Strategy management final project	1. Porter, M. E. (1996). What is strategy? Harvard Business Review, 74 (6), 61-78. Access through: http://cs.furman.edu/~pbatchelor/mis/Slides/Porter%20Strategy%20Article.pdf (or find online at google scholar) 2. Mintzberg, H. (2001). Crafting strategy. Understanding nonprofit organizations: governance, leadership, and management, 158. Access through: 3. http://partnersinperformance.us/wp-content/uploads/2015/06/Mintzberg_Crafting_Strategy_HBR.pdf 4. Henderson, B. (1989). The origin of strategy: What business owes Darwin and other reflections on competitive dynamics. Harvard Business Review, 67(6), 139-143. Access through: http://www4.ncsu.edu/unity/users/p/padilla/www/480-Strategy/Origin%20of%20strategy%20HBR%201989.pdf	Rank-Ordered Project Preferences Due **January 28 by 6:00 PM**

Learning Objectives	Readings and Pre-Class Activities	Class Notes
•Form teams for various assignments and activities for the duration of the course	5. Moseley, G.B. (2017). Managing Health Care Business Strategy. Chapter 1 Video: https://www.youtube.com/watch?v=0BgMQkKMKaE (Porter on Strategy) Community Toolbox (Look through the strategy and planning tools available): https://ctb.ku.edu/en/table-of-contents/overview/model-for-community-change-and-improvement	
Session 2: Strategic Thinking, Leadership and Competitive Advantage (January 31)		
•Identify the characteristics of a strategic thinker •Explain strategic thinking and describe its relation with systems thinking •Discuss the importance of leadership in strategic momentum •Identify the stakeholders in strategy management •Understand the industrial organizational model and resource-based model Analyze what is core-competence •Prepare a case-based interview •Apply balanced score card as a specific management tool for monitoring the progress of strategic initiatives	1. Mintzberg, H. (1978). Patterns in strategy formation. Management science, 24(9), 934-948. Access through: http://www.jstor.org.ezproxy.bu.edu/stable/2630633?seq=1#page_scan_tab_contents 2. Prahalad, C. K., & Hamel, G. (1990). The core competence of the corporation. Harvard Business Review on the Point Article, 275-292. Access through: http://www.cuhkemba.net/Nova_Management/07/0712/071223,%2030/The_Core_Competence_of_the_Corporation.pdf 3. Inamdar, N., Kaplan, R. & Bower, M. (2002). Applying the balanced scorecard in healthcare provider organizations. Journal of healthcare management/American College of Healthcare Executives, 47 (3), 179. Access through: http://www.biomedsearch.com/article/Applying-Balanced-Scorecard-in-healthcare/94510077.html or via BU e-journals with login/password 4. Moseley, G.B. (2017). Managing Health Care Business Strategy. Chapters 15-18 Optional: Read Chapter 1 and 2 from Marc Cosentino, Marc. *Case in Point* on case-based interviews. (Reference copy in BUMC Library on INS 12th Floor) Video: https://www.youtube.com/watch?v=MtBt-6TcJuw http://www.youtube.com/watch?v=M_IlOIywryw Video: Dr. Vicky Parker's interview posted on BlackBoard	
Session 3: Strategic Assessment of the Internal Environment Part 1 (February 7)		
•Define the characteristics of mission and vision statements •Describe competitive	1. Collins, J., & Porras, J. (1996). Building your company's vision. Harvard Business Review, 74, 65-78. Access through: http://www.vision4dynamics.com/f/Building_Your_Company%E2%80%99s_Vision.pdf 2. Mintzberg, H. (1994). The fall and rise of strategic planning. Harvard business review 72 (1), 107-114. Access through:	**Guest Speaker** Cathy Skulnick, BU MBA-MPH

Learning Objectives	Readings and Pre-Class Activities	Class Notes
advantage and its relevance to health care •Describe the various stages of strategy formulation •Discuss the various organizational structures in health care	https://hbr.org/1994/01/the-fall-and-rise-of-strategic-planning 3. Moseley, G.B. (2017). Managing Health Care Business Strategy. Chapter 2, 6-8 Videos: https://www.youtube.com/watch?v=QPu4v_Ae0Vc https://www.youtube.com/watch?v=LJhG3HZ7b4o http://www.youtube.com/watch?v=bl5cyZlay4k Community Toolbox - Chapter 8: https://ctb.ku.edu/en/table-of-contents/structure/strategic-planning/vmosa/main	Dual Degree Student, Senior Assoc Intern at PwC Consulting
Session 4: Strategic Assessment of the Internal Environment Part 2 (February 14)		
•Discuss utility of value chain analysis to evaluate competitive analysis •Develop a product life cycle analysis •Use the 4Ps of marketing •Use the 7S framework •Analyze using Boston Consulting Group Matrix •Learn about generic strategies	1. Moore, G. (2004). Darwin and the Demon. Harvard Business Review, 82 (7/8), 86-92. Access through: https://hbr.org/2004/07/darwin-and-the-demon-innovating-within-established-enterprises 2. Normann, R., & Ramirez, R. (1993). From value chain to value constellation: designing interactive strategy. Harvard Business Review, 71, 65-65. Access through: https://hbr.org/1993/07/designing-interactive-strategy Video: https://www.youtube.com/watch?v=mu9TWlcjNKk https://www.youtube.com/watch?v=ekVereJE1ZI (continued) Video: Michael Porter, Value-based care (9 mins) https://www.youtube.com/watch?v=6vuiYFtK2wo Video: Cleveland Clinic (5 mins) https://www.youtube.com/watch?v=NYnu0-PKjlM Case study 1: Michael E. Porter; Elizabeth Olmsted Teisberg (2009). Cleveland Clinic: Growth Strategy 2014. Harvard Business School, Product 709473-PDF-ENG, 23p.	
Session 5: Strategic Assessment of the External Environment (February 21)		
•Discuss various environmental influences in health care •Explain Porter's five forces model •Describe the process of external environmental analysis •Explain various tools for soliciting expert	1. Porter, M. (2008). The Five Competitive Strategies that Shape Strategy, Harvard Business Review, 78-93. Access through: https://pdfs.semanticscholar.org/0510/4ae250945a341ca90275e62c96aa6102782c.pdf 2. Michael E. Porter; Thomas H. Lee (2014) The Strategy that Will Fix Healthcare, HBSP Coursepak R1310B-PDF-ENG 3. McCain, G. (1987). Black holes, cash pigs, and other hospital portfolio analysis problems. Journal of health care marketing, 7(2), 56. Access through: BU e-journals. http://web.ebscohost.com.ezproxy.bu.edu/bsi/detail?sid=2fc2d2ef-93c2-48e6-9e84-	

Learning Objectives	Readings and Pre-Class Activities	Class Notes
opinion (e.g. Delphi method, Nominal Group Techniques, Brainstorming). •Build an analysis for the strategic plan based on a firm's strength, weakness, opportunity and threats (SWOT). •Analyze using a Boston Consulting Group matrix	e329120cf9af%40sessionmgr111&vid=1&hid=125&bdata=J nNpdGU9YnNpLWxpdmU%3d#db=bth&AN=6898540 4. Moseley, G.B. (2017). Managing Health Care Business Strategy. Chapter 3-5, 21 Videos: http://www.youtube.com/watch?v=0D2fT6obqdg http://www.youtube.com/watch?v=mYF2_FBCvXw http://www.youtube.com/watch?v=uvwjip3CTMA http://www.youtube.com/watch?v=lc36fK38pLA	
Session 6: (February 28) Global Healthcare Delivery, Underserved Communities and Technology Solutions		
•Explain concepts of outsourcing, medical tourism, and global health care initiatives •Discuss the strategic implication of globalization on health care •Discuss the opportunities and challenges faced while dealing with globalization	1. Gottfredson, M., Puryear, R. & Phillips, S. (2005). Strategic sourcing. Harvard Business Review, 83 (2), 132-139. Access through: https://tmg610team2.files.wordpress.com/2013/09/strate gicsourcingfromperiphery-harvard1.pdf 2. Ghemawat, P. (2005). Regional strategies for global leadership. Harvard business review, 83.12: 98. Access through: https://cb.hbsp.harvard.edu/resources/marketing/docs/G hemawat_article.pdf (continued) 3. Jones, G. (2012).The Growth Opportunity That Lies Next Door. Harvard Business Review, 90(7-8), 141-145. Access through: http://hbr.org/2012/07/the-growth-opportunity-that-lies-next-door/ar/1 4. John A. Quelch; Margaret Rodriguez Note on Mobile Healthcare. HBSP Coursepak (continued) Video: http://www.ted.com/talks/pankaj_ghemawat_actually_the_wo rld_isn_t_flat.html Case Study 2: Amy Madore; Julie Rosenberg; Rebecca Weintraub (2017). Project ECHO: Expanding the Capacity of Primary Care Providers to Address Complex Conditions, Harvard Medical School/Brigham and Women's Hospital. GHD-036	**Guest Speaker:** Sarah Sagan, MPH Project Manager Dimagi, Inc. Software social enterprise that improves health care delivery in 50+ underserved communities
Session 7: Entrepreneurship and Building Great Organizations (March 14)		

Learning Objectives	Readings and Pre-Class Activities	Class Notes
•Discuss challenges of entrepreneurship •Identify potentially valuable opportunities for entrepreneurship in healthcare •Discuss obtaining the resources necessary to pursue an opportunity and to create an entrepreneurial organization. •Discuss strategies on managing the entrepreneurial organization once it has been established. •Learn about growing the business into a sustainable enterprise.	1. Lerner, J., & Sahlman, W. (2012). Reviving Entrepreneurship. Harvard Business Review, 90 (3), 116. Access through: http://web.ebscohost.com.ezproxy.bu.edu/bsi/detail?sid=761c0767-2836-47d8-96b2-4cd3c3a8492e%40sessionmgr4&vid=1&hid=11&bdata=JnNpdGU9YnNpLWxpdmU%3d#db=bth&AN=71884707 2. Porter, M. E., & Rivkin, J. (2012). Choosing the United States. Harvard Business Review, 90 (3) 80-93. Access through: http://web.ebscohost.com.ezproxy.bu.edu/bsi/detail?sid=f363e591-b665-4c9a-a067-538d028302a6%40sessionmgr12&vid=1&hid=11&bdata=JnNpdGU9YnNpLWxpdmU%3d#db=bth&AN=71884328 3. Guy, K. (2013). How Entrepreneurs Come Up With Great Ideas. Wall Street Journal. Access through: http://online.wsj.com/article/SB10001424127887324445904578283792526004684.html 4. Moseley, G.B. (2017). Managing Health Care Business Strategy. Chapters 11, 14 5. Video: http://www.youtube.com/watch?v=m4Ch2z5ftwQ *Shark Tank In-class Competition*	(To be confirmed) **Guest Speaker:** Meredith Walker, MSW, recently Director of Ambulatory Care Operations, VA Boston Healthcare
Session 8: Mergers, Alliances and Acquisitions (March 21)		
• Discuss key strategic concepts underlying mergers and acquisitions as strategic options including economies of scale, economies of scope, and market share •Define horizontal and vertical integration •Learn key strategic concepts underlying vertical integration such as a strategic option including dulled financial incentives, transfer pricing, pure play, and transaction costs	1. Kumar, N. (2009). How emerging giants are rewriting the rules of M&A. Harvard Business Review 87(5), 115-121. Access through: http://mountainmentorsassociates.com/files/HBR_-_How_Emerging_Giants_are_Rewriting_the_Rules_of_M_A.pdf 2. The Boston Consulting Group the Role of Alliances in Corporate Strategy : Access through: https://www.bcgperspectives.com/content/articles/alliance_joint_ventures_corporate_strategy_portfolio_management_the_role_of_alliances_in_corporate_strategy/ 3. Moseley, G.B. (2017). Managing Health Care Business Strategy. Chapters 12, 13 Case Study 3: Akhilesh S. Pathipati; Mary K. Bundorf (2017). Massachusetts Eye and Ear: Deciding Whether to Join Partners HealthCare. P92-PDF-ENG	**Alumni Speaker** Rodney Vanderwarker, MPH, VP of Primary Care, Behavioral Health & Institute Operations, Fenway Health

Learning Objectives	Readings and Pre-Class Activities	Class Notes
•Strategically think about specific considerations for vertical integration decisions in the healthcare industry including hospital acquisitions of physician practices		
Session 9: Disruption / Business Model Innovation (March 28)		
• Define disruptive innovation • Review the semester and solve any concerns	1. Lepore, J. (2014). The Disruption Machine, What the gospel of innovation gets wrong, The New Yorker. Access through: http://www.newyorker.com/magazine/2014/06/23/the-disruption-machine 2. Christensen, C. M., & Overdorf, M. (2000). Meeting the challenge of disruptive change. Harvard business review, 78 (2), 66-77. Access through: http://www.hks.harvard.edu/hauser/ngoforum/pdf/2013/Meeting_the_Challenge_of_Disruptive_Change.pdf 3. Christensen, C. M., Bohmer, R. and Kenagy, J. (2000).Will disruptive innovations cure health care? Harvard business review, 78 (5), 102-112. Access through: https://pdfs.semanticscholar.org/cc81/45dd377fbec812d64585cc828ad0baa03b67.pdf 4. Moseley, G.B. (2017). Managing Health Care Business Strategy. Chapters 19, 20 Case Study 4: Nancy M. Kane (2017) Humana's Bold Goal: 20 Percent Healthier by 2020. Harvard T.T. Chan School of Public Health. Product: PH6-015, 26p. Videos: https://hbr.org/video/2226808799001/disruptive-innovation-explained http://www.youtube.com/watch?v=WxwR_TTuKdc http://www.youtube.com/watch?v=ko5QaguuDXs	**Guest Speaker** Troy Keyser, MA HIT Senior Manager at Partners HealthCare Innovation
Session 10: Ethics in the strategy market (April 4)		
•Discuss antitrust issues and its effects •Gain knowledge about fraud/abuse and tax issues •Summarize the legal concerns in health care on	1. Scheffler, R.M., Shortell, S.M., & Wilensky, G.R. (2012). Accountable Care Organizations and Antitrust: Restructuring the Health Care Market. JAMA, 307(14), 1493-1494. Access through: http://jama.jamanetwork.com.ezproxy.bu.edu/article.aspx?articleid=1148379 2. Martin, R. L. (2002). The virtue matrix: Calculating the return on corporate responsibility. Harvard Business	**Guest Speaker:** Elizabeth Chen, PhD, MBA, MPH

Learning Objectives	Readings and Pre-Class Activities	Class Notes
implementation of a new strategy •Describe: Certificate of need, Kickback Statue •Role of the board and CEOs in ethical corporate responsibility •Discuss how one needs to be "morally focused"	Review, 80 (3), 68-75. Access through: https://www.researchgate.net/profile/Roger_Martin2/publication/11469813_The_virtue_matrix_Calculating_the_return_on_corporate_responsibility/links/0fcfd50800ca3d126a000000/The-virtue-matrix-Calculating-the-return-on-corporate-responsibility.pdf Video: http://www.youtube.com/watch?v=pYso_THGkb8 (warning 1 hour long)	Assistant Commissioner at Massachusetts Department of Public Health; University of Massachusetts Boston

Session 11: Horizontal and Vertical Integration (April 11)

Learning Objectives	Readings and Pre-Class Activities	Class Notes
•Differentiate between Blue Ocean and Red Ocean strategy •Recognize alliances as a strategic alternative to ownership of assets •Describe the lifecycle of alliances and its implications for strategy formulation •Describe the methodology for valuing assets in the context of acquisition decisions •Use the Strategic position and action evaluation model (SPACE)	1. Chan, K. & Mauborgne, R. (2004). Blue Ocean Strategy. Harvard Business Review, 71. Access through: https://pdfs.semanticscholar.org/a856/dfcff4b2cae34def4d09ffea2c1a3f6d5f44.pdf 2. Porter, M. 1998. Clusters and the new economics of competition. Harvard Business Review, 6: 77-92. Access through: http://hdrnet.org/349/1/porter.studie.pdf Video: https://www.youtube.com/watch?v=clp-IMpuwaQ http://www.youtube.com/watch?v=HgfwzPRyVvw http://www.youtube.com/watch?v=e9dPzyE3jJw http://www.youtube.com/watch?v=424knhtXZ6U https://www.youtube.com/watch?v=8ExRnpy4rPE	**Guest Speaker:** Frantz Berthaud, MPH MPH Dana-Farber Cancer Institute

Session 12: Implementation / Change / Capacity Building (April 25)

Learning Objectives	Readings and Pre-Class Activities	Class Notes
•Discuss the basic concepts for overseeing and monitoring the progress of strategic initiatives	1. Kotter, J.P. (2007). Leading Change: Why Transformation Efforts Fail. Harvard Business Review, 85(1), 96-103.Access through: http://89.248.0.102/upload/Topplederprogrammet/Innsider/Kull9/Litteratur/2.1%20Leading%20Change%20-%20W	**Guest Speaker:** Caitlin Clear, MPH, CAPM Regional Implementation

•Learn about basic conceptual issues regarding strategy change and adaptation in complex organizations •Identify specific management approaches that can be utilized to manage a strategy change process	hy%20Transformation%20Efforts%20Fail%20by%20JP%20Kotter.pdf 2. Miles, R. H. (2010). Accelerating corporate transformations (Don't lose your nerve!). Harvard Business Review, 88 (1), 68-75. Access through: http://content2.learntoday.info/lewis/LL_524_Spring_11/media/Accelerating_Corporate_Transformations.pdf 3. Collins, J. (2005). Level 5 Leadership: The Triumph of Humility and Fierce Resolve. Harvard Business Review, 83 (7/8). Access through: https://coachready.com/_admin/images/material/162.pdf 4. Moseley, G.B. (2017). Managing Health Care Business Strategy. Chapters 9, 10 Video: http://www.youtube.com/watch?feature=player_embedded&v=zD8xKv2ur_s#t=18	Specialist, Network Development and Integration, MGH
Session 13: Final presentations (May 2)		
The SCP groups will be presenting their SCP reports to the Board of Directors		Final SCP presentation in-class
Session 14: Strategy, Healthcare and its (our) Future (May 9)		
•Discuss the current market dynamics of healthcare •Discuss some key success factors in the world of healthcare strategy •Discuss careers in strategy •Peer evaluation of the SCP report	1. Porter, M. E., & Teisberg, E. O. (2004). Redefining competition in health care. Harvard Business Review, 64-77. Access through: https://www.cigna.com/pdf/hbr_porter_teisberg.pdf 2. Gawande, A. Slow Ideas: Some innovations spread fast. How do you speed the ones that don't? The New Yorker, Read more: http://www.newyorker.com/reporting/2013/07/29/130729fa_fact_gawande?printable=true&currentPage=all#ixzz2co94of2C	Final SCP report Due May 6

•Discuss your role in the world of healthcare strategy	Video: http://www.youtube.com/watch?v=7fSjfGYCqEw	

Assessment guidelines

Class Participation

While some of the material in this class will be new to all students, there will be elements that students have encountered before. To accommodate this, there will be some lecture/reading to introduce concepts; however, there will be a greater emphasis on discussion to explore the material. The theory becomes much more real when considered in context and from many angles. To this end:

1. You are responsible for completing course assignments. Course assignments must be submitted for grading through the Assignments tool on the Blackboard course site. All other assignments are due by the **start of class** (unless otherwise noted). Late assignment submissions will be accepted with a 20% penalty applied each 24-hour period following the due date, unless otherwise approved by the instructor. Assignments submitted 5 days or more past the assigned due date will not be accepted for credit unless previously approved by the instructor. Please note that you are given this syllabus on the first day of class; penalties will be assessed per the syllabus without exception.
2. All the session readings and video visuals are expected to be completed **before that class** so you can participate in the class discussions. Meaningful contributions are valued and expected.
3. You are expected to demonstrate **academic integrity in all assignments**. Plagiarism is one form of academic misconduct, and will not be tolerated. Please read about Academy Honesty explained on page 9 of this syllabus.
4. Participation provides you with the opportunity to gain ownership and the ability to make decisions. The instructor will provide you with your name card each week upon your class arrival. **Please use your name card every week** so that the instructor and other students can quickly and easily connect with you. You will receive 1 point for every week that you use your name card, for 14 max points.
   a. For the purpose of this course, **participation means your citizenship in this course**. Considering every individual expresses themselves uniquely, you will be assessed using all the sources made available in the course. These include: Blackboard, class project, class discussions, presentations and team-participation. Computer usage **is** allowed in class. However, please also note there will be negative grading for visiting unnecessary and irrelevant websites during class (Facebook, Twitter, etc.). Additionally, sending text messages in class will also be considered negative in the grading criteria unless they are required for a classroom exercise.
5. **Feedback on team participation** in the class will be provided multiple times within the span of the semester.

Appendix A

Case Preparation/Writing and Discussion

In job interviewing and on the job, recent graduates and seasoned leaders/managers alike are faced with problems that require understanding a complicated situation, applying relevant theory and common sense to it, and formulating and testing a solution. Much like in real life, cases are written so that there is no single correct solution—you will find that you and your classmates may have different ideas about the nature of the described situation and the best way to resolve it. That's fun, and that is where the learning is.

Case teaching is based on discussion, and if you are going to discuss a case, you will have to come prepared. A typical case has 10-20 pages plus exhibits, so set aside at least three hours per case. Some good resources on how to do case analysis are:

- Bill Ellet's The Case Study Handbook: How to Read, Discuss, and Write Persuasively About Cases (HBS Press, 2007) $14 on Amazon.com
- Case Analysis Coach (cb.hbsp.harvard.edu/cb/product/4380-HTM-ENG), an online resource developed by Robert D. Austin and Robert L. Kelley. $9 online
- Cases: How to prepare for them and learn from them, a five-episode video by Espen Andersen and Hanno Roberts of the Norwegian Business School, available on You Tube. https://www.youtube.com/watch?v=X1TX-Hi6PrI (Free!)

Prepare a case as follows:

- First, refer to the Case Grading Rubric (Appendix A).
- Second, read the case quickly, to understand the organization, industry, and exhibits.
- Next, read the case carefully, answering the case study questions. These questions are designed to highlight salient portions of the case and make you do needed analysis.
- Make a sheet of notes with your suggested solution (or alternative solutions) to refer to if you are asked to open the case discussion. Be sure:
  - DIFFERENTIATE FACTS versus OPINIONS
  - Separate situation "facts" from stakeholders' "opinions" as presented in the case. Both are important, but as a decision maker, you should communicate that "facts" are consideration items that everyone can agree upon. "Opinions," on the other hand, represent the positions stated by stakeholders. They can include facts, but they often represent rational, emotional or sensory responses to a situation as perceived and held by stakeholders. Because they are personally held, opinions may differ even when based on identical facts. As Senator Daniel Moynihan of Massachusetts put it: "Everyone is entitled to his own opinion, but not his own facts."
- **THEN MAKE YOUR CASE: Proposing evidence-based decisions and action plan**
    - **Start by providing brief review of the case facts. Everyone will have read the case, so don't belabor this, i.e., provide the background/context that is relevant to the decision/action at hand.**

- **Clearly state the problem(s) or opportunity(ies) that require a decision and/or action.** Cases usually have a protagonist who is a CEO, a manager someone whose responsibility it is to make a decision/take action. (ex. You can say "President Jones of Hospital A is facing the decision of whether or not to acquire local competing Hospital B. What complicates the decision is whether or not Pres. Jones can secure enough financial backing from lenders, gain Board of Director support, and state regulator acceptance.")
- **Clearly state your proposed decision** (ex. I believe President Jones should propose that Hosp A acquire Hosp B.) **and brief step-by-step plan of action** (ex. "Pres. Jones should first…. If the Board agrees, then Pres. Jones should next….etc.)
- **Then build your position as to why this is the best decision and course of action by providing salient evidence (case facts and stakeholder opinions) that support your position.** Like a lawyer in a courtroom, think about presenting your "audience" (reader or classroom) with: financial figures, geographic displays, timelines, organization charts, illustrations, articles of prior successes/failures resulting within a similar situation) that support your decision and plan of action.
- **Mention any threats or barriers that may need to be overcome, and your plan of action to anticipate these. If there is opposing evidence, acknowledge it and then counter it.** Demonstrate that you've thought through the pro's and con's (benefits and risks) of the situation, and are prepared to address problems that might arise.
- **Remember, you must prioritize (be selective about) what you present** because your writing assignment or presentation time in class is limited and so is your audience's.
- **Summarize by briefly restating (3), selectively supporting by addressing (4) + (5).**
- Before class, meet with your study group and discuss the case with them. Chances are, you will find that your preferred solution is but one of many—and that it might require some adjustment.
- Submit your written case online and come to class - you're prepared!
- **Always remember to bring and display your name card** so that the teacher and your fellow students can refer to you by name, to recognize (and reward) your **respectful, relevant, persuasive participation.**

Written Case Analysis Grading Rubric (150 points total or 15% = 50 pts max/case)
Each student is required to **analyze 3 out of 4 cases** discussed at class. Each analysis will consist of answering multiple questions. These case analyses should be maximum three pages (font 12 size, typed, single spaced) and will have at least the following information:

1. Identifying Information: Title of case (complete title and citation), student name, date. (5 points)

2. Addressing Questions Posed: This section should provide answers to each question posed for the given case. Please make sure you have clearly identified the question. (45 points)

Per Case Score	Exemplary	Competent	Needs Work	Total Score
Identifying Information 15 points	(Title of case (complete title and citation), student name, date *Must all be present to receive credit* **15 points**		One or more pieces of identifying information are missing **0 points**	_____/15
Content 90 points	Questions are thoroughly answered with several examples from the case to support answers. Examples from the case are clearly explained. **60-90 points**	Questions are answered but only minimally supported by the case. Examples from the case are not given adequate explanation. **0-59 points**	Questions are not supported by examples from the case **0 points**	_____/90
Structure 30 points	Answers are well formatted so that each answer has a clear beginning, middle, and end. The proper document format has been followed (max 3 pages, font size 12, single spaced) **15 -30 points**	Answers have some structure but paragraph and/or essay structure could use improvement. Document format partially followed. **0-14 points**	Answers do not follow any structure. Multiple document formatting errors. **0 points**	_____/30
Grammar 15 points	Few to no spelling and grammar errors **8-15 points**	Several spelling and/or grammar errors **1-7 points**	Significant spelling and /or grammar errors interfere with the ability to read answers **0 points**	_____/15
			TOTAL	_____/15 0

Appendix B

It's Elementary Grading Rubric (100 Points or 10%)

Student Name:

	Exemplary (80-100)	Competent (21-79)	Needs Work (0-20)	Total Score (/100)
Knowledge / understanding :	Demonstrates a depth of understanding by using relevant and accurate research and citations. Research is thorough and goes beyond what was discussed and/or presented in class.	Presentation uses knowledge that is generally accurate with only minor inaccuracies and is generally relevant to thesis. Research is adequate but does not go much beyond what was presented in class or in text.	Presentation uses little relevant or accurate information, not even what was presented in class or in the text. Little or no research apparent.	
Thinking / inquiry	Work is centered on a thesis with a highly developed sense of awareness and conceptual ability.	Presentation shows an analytical structure and central thesis, but the analysis is under developed or linked to the thesis.	Presentation shows no analytical structure or central thesis.	
Communication	Work is imaginative and effective in conveying ideas to the audience. Presenter responds effectively to audience reactions and questions.	Presentation techniques used are effective in conveying main ideas, but are unimaginative. Some questions from the audience remain unanswered.	Presentation fails to capture the interest of the audience and/or is confusing.	
Use of visual aids	Presentation includes appropriate and easily understood visual aids, which the presenter refers to and explains at appropriate moments in the presentation.	Presentation includes appropriate visual aids, but these are too few, in a format that makes them difficult to use, understand, or does not refer to or explain them.	Presentation includes no visual aids or visual aids that are inappropriate, too small, or messy to be understood. No mention of the visual aids is made in the presentation.	
Presentation skills	Presenter speaks clearly and loudly enough to be heard, using eye contact, a lively tone, gestures and body language to engage the audience.	Presenter speaks clearly and loudly enough to be heard but tends to drone, fails to use eye contact, gestures, and body language consistently or effectively.	Presenter cannot be heard and/or speaks unclearly, so cannot be well understood. No attempt is made to engage the audience through eye contact, gestures, or body language.	
Time effectiveness	5 minutes-20 slides—15 seconds per slide	6 minutes- & or 21 slides—20 seconds per slide	> 6 minutes- >21 slides ->20 seconds per slide	

Appendix C

Strategic Planning Retreat Assignment Grading Rubric (100 points or 10%)

Each item is rated on the following rubric.

1= Very poor
2 = Poor
3 = Adequate
4 = Good
5 = Excellent

Group Members:

_____

Assigned Case Reading: _____   Date: _____

Item	Score				
1. Evidence of preparation (presentation starts on time/no delays, organized presentation, presentation/discussion flows well, no awkward pauses or confusion from the group)	1	2	3	4	5
2. Content (group presented creative & relevant information, appeared knowledgeable about topic discussed, content was logical and presented in sufficient detail)	1	2	3	4	5
3. Relevance (group identified relevant problem/issues, discussed relevance to the organization, remained consistent with the assignment objectives)	1	2	3	4	5
4. Delivery (effective introduction and conclusion, group members speak confidently and clearly, transition between speakers, oral communication skills— eye contact; all group members participated, appropriate dress)	1	2	3	4	5
5. Discussion (group initiates and maintains class discussion concerning strategic planning activity, use of visual aids, good use of time, involves all classmates)	1	2	3	4	5

Total Score: _____ (sum of items 1-5)

Total Score * 4: _____ (to make the maximum assignment of 100 points)

Comments:

Appendix D

SCP Requirements and Presentation Rubric
Team charters will be discussed and completed in the second week of class. This will assist in addressing any concerns teams may have about their organization, decision-making or purpose.

The submission of this project work will be completed when the following assignments are submitted:

Assignment Notes:

1. <u>Rank-ordered Project Preferences</u> - Organization choice and team grading criteria: Every attempt will be made to allow students to participate in their preferred organization/project. Students must respond to the Qualtrics survey no later than **Friday, January 26th** and rank order their project preferences. The instructor will determine the project teams from that information. While every attempt will be made to allow students to participate in their highest preference project, the instructor reserves the right to assign students to projects based on project needs.

2. <u>SCP Final Presentation</u>: The SCP presentation will be the culmination of all your hard work. The teams will be provided 15 minutes to present and 5 minutes to answer questions (**May 2, 2018**). The grading rubric is posted on Blackboard. Also, find some presentation tips uploaded on BlackBoard. All students **must** be present for the presentations. The **whole team** is required to present.

3. <u>SCP Final Report</u>: Several days after the project presentation teams are expected to submit the project report (**May 6, 2018**). The SCP report will include all details of the project. Please use frameworks and tools taught in the class. The template for the reports has been provided on Blackboard. Additionally, there are deadlines for submission of parts of the report (see above). The grading rubric for this project report is on BlackBoard.

	SCP Requirement (500 Points Max)	**Points**	**Due**
1	**Rank-ordered project preferences** • Please complete the Qualtrics survey to identify your project preferences.	**0**	**Jan 28**
2	**Intro on the organization, set meeting schedule with sponsor, Team Charter** and **Project Charter for Teams and Sponsor**. Please submit your **Intro to Organization, Team Charter** and **Project Charter** via BB. <Find in Manager's Toolkit.>	**50 pts**	**Feb 9**
3	**Mission, vision and values of the organization** • Please submit your organizations mission, vision and values.	**20 pts**	**Feb 14**
4	**Analyzing the current situation (Narrative) (Internal +External Environment Scan)** *This section should include your SWOT Analysis, Porter's Five Forces, etc.* 　**A. Product and/or service categories** 　　• What products and services are offered? 　**B. Define the service area**	**40 pts**	**Mar 21**

		SCP Requirement (500 Points Max)	Points	Due
		• What is the company's service area? • What is the preferred service area? • Who are the competitors in the service area? • What is unique about the service area? **C. Create a service area profile** • Demographics • Competitor analysis • Key or unique features • Identify trends over time • Future projects **D. Mapping of strategic groups** • Who are the most important stakeholders to growth of your service/product? • Who are they connected to, and why? • Why are these groups critical to the long-term strategy of your organization?		
5		**Summarizing and forming a report (Narrative)** **A. Synthesize Analyses** • Following the collection of your data, what have you learned? • What are your main categories/themes based on interviews? • What have you learned following the development of tables from surveys or other secondary data sources? • Develop budgets/ROI if necessary to help guide your examination of the options. • Bring this information together in a comprehensive synthesis. **B. Strategic Alternatives** • Fully describe the pros and cons of each of the strategic alternatives/options that the company may choose from in its planning • Identify the strategic alternatives that your organization may have as options based on your data analysis. • Organize <u>and</u> prioritize the strategic alternatives/options. **C. Strategic Choice/ Recommendations** • Present recommendations for which direction the organization should proceed • These should be based on your prioritization of the alternatives. • To the extent possible, predict what may happen if options are implemented.	40 pts	Apr 11
6		**Final Presentation (PowerPoint)** • 15 min presentation (+5 min Q&A) to our panel of experts and your Sponsors. • To be submitted via BlackBoard prior to the class where presentations are held.	150 pts	May 2
7		**Final Report (Narrative)** • Submission of final narrative (sum of previous narratives throughout the course)	200 pts	May 6

Evaluation Rubric for Strategic Consulting Project Presentation

Each item is rated on the following rubric.

1= Very poor

2 = Poor

3 = Adequate

4 = Good

5 = Excellent

Team Name:

Item	Score				
1. Evidence of preparation (Organized presentation; slides are professional looking and mistake-free; timed effectively for 15 min presentation and 5 minutes for questions)	**1**	**2**	**3**	**4**	**5**
2. Delivery (group members speak confidently and clearly; all group members had speaking role; transition between speakers was comfortable-no awkward pauses; good eye contact; appropriate dress)	**1**	**2**	**3**	**4**	**5**
3. Content (group presented relevant background information on the organization; clearly described the problem, aims, methods/approach, and key findings; appeared knowledgeable in responding to questions)	**1**	**2**	**3**	**4**	**5**
4. Quality of Recommendations (thought processes led to logical recommendations; recommendations could reasonably be implemented; budget (if applicable) was appropriate; included a timeline for implementation)	**1**	**2**	**3**	**4**	**5**

Total Points: _____

Total Points*7.5: _____ (to make the maximum assignment of 150 points)

Comments (positive and/or areas for improvement):

Appendix E - It's Elementary (Presentation Dates)

Here are guidelines to develop your "It's Elementary" (Ignite) presentations.

1) Select a concept (or combination of concepts) addressed in the readings for the Session Topic that week.
    a. For example, the Session 3 Topic is: Strategic Assessment of the Internal Environment Part 1.
    b. One of the concepts addressed in the Moseley text (Ch 6) is: the purpose that the mission, vision and values statements serve in the strategic planning process. (You may choose a concept from any of the readings that week. You can also cite a video, but the readings are your primary source.)
    c. Your presentation should:
        i. Identify what concept you are focusing on (remember to cite its source(s));
        ii. Tell us briefly why you believe it is important to healthcare business strategy (Helpful to provide a number to substantiate why it is important; ex. # patients affected; # lives that could be saved; # loyal nurses retained; potential revenue growth or cost savings in $ dollars) and why the concept interested you;
2) Explain the concept(s) to us. Walk us through the important elements to remember.
    a. For example, in Moseley (Ch 6), he differentiates purposes of an organization's Mission Statement, versus the purpose of its Vision Statement, versus the purpose of its Values Statement. He goes on to describe how these three inform Strategic Objectives at both the Corporate level and strategic business unit (SBU) level of an organization.
3) Illustrate the concept with one or more real-world example(s). Moseley (Ch 6) does just this for us by providing the Mission, Vision and Values statements and the strategic direction of several diverse health organizations. You help us to understand and relate to the concept by describing a real-world example(s).
    a. They should be about a health-related organization (healthcare delivery, policy and regulation, insurance, pharma, medical devices, etc.
    b. They may be from your own work/volunteer experience or from your research of the topic.
    c. Please do not simply repeat examples provided in the reading. You can certainly refer to these, but demonstrate that you have done your own in-person or online investigation.
4) Summarize your story for us. Tell us again briefly:
    a. Why the concept you chose is important and interesting (to you and the world)
    b. What the one-two things are that we should remember for our future strategic health management practice or study.
5) You may use notes/notecards for your presentation, but please do not just read from them. Know your presentation well enough to look at and engage with the audience so that we connect with you and your topic. Try to relax! We're interested to hear about the strategy ideas that are important you!

For more, see: http://www.edutopia.org/blog/teaching-presentation-skills-with-ignite-andrew-miller.

To clarify:

- **Your slides should contain images only (e.g. no/few words). Include photographs, graphics, diagrams,** etc.). You may use a collage format slide that combines several photos/images to convey your message.
  *if you include a bar graph or similar that has very small words that can't be read, that is okay. And if a large graphic contains a word, that is also okay.
- The PowerPoint presentation should contain 20 slides, and they should be timed to advance every 15 seconds.
- You may place photo citations at the bottom of each slide or you may add a 16th slide entitled "Citations" that lists all the citations by Slide number. But you must stop talking at the end of Slide 20.
- Here are guidelines for citing photos (or other sources): http://www.easybib.com/guides/citation-guides/apa-format/how-to-cite-a-photo-digital-image-apa/
- Your **PowerPoint file title** MUST include your **full name** and the **date on which you present**
- You must time your talk so that it works with the slide timing. When the last slide ends, you must stop speaking.
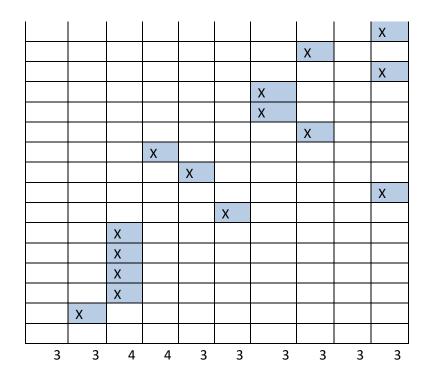
Style-wise, here are more helpful ideas for your "It's Elementary" presentation from Ignite enthusiast Scott Berkun at: http://scottberkun.com/2009/how-to-give-a-great-ignite-talk/

- **Pick strong stories and big themes**. What do you love? What do you hate? What is the best advice anyone ever gave you? Pick stories with big themes, since they require less introduction. What are the 4 most important things to know about X that no one talks about? The stronger the topic & title the easier the material is to create. Consider what one thing you want people to have learned when you're done; drive this point home.

- **Outline 4 or 5 main points.** You need a structure to make your message clear, and make sure people can follow along. Don't assume you can just ramble your way through: the short format means you need to be more careful about how you use your time, not less. Ask yourself: what are the major lessons or points you want people to remember when you finish? That's the structure of your presentation.

- **Figure out your points before you make slides**. Talking about something for five minutes is easy – give it a shot once or twice before you make a single slide (practice with a timer) it will help you sort out what you want to say. You'll quickly discover how unlikely it is to run out of things to say during an It's Elementary talk. Once you know the 4 major points you want to make, then work on finding images and slides to support what you're going to say.

- **5 minutes is easy to practice.** You can practice 10 times in an hour. Do it (The average It's Elementary speaker practices 5 times). 300 seconds equals 10 television commercials – you can make great points in a short time if you refine your thoughts. The entire Sermon on the Mount can be read in about 5 minutes and The Gettysburg Address takes about 2 and a half minutes.

- **It is good to breathe**. There is no law that says you must fill every second with talking. When you practice, practice breathing. Give your audience a moment to digest the last thing you said. Take a moment between points. Like whitespace in visual design it's the pauses that make what you do say stand out clearly. Give yourself a slide or two that's for just for catching up and taking a breath.

- **Don't get hung up on slides**. What you say matters most. Good slides support what you're saying, not the other way around. The last thing you want is to end up chasing your slides, a common problem at It's Elementary as you'll never catch up. Pick simple images and if you must use text, be sparse (and use large 50+pt fonts). No bullet lists, just one or two points. Make the slides flexible enough that if you fall behind it's easy to skip something to catch up.

- **Make your talk fault tolerant**. Unlike normal presentations, if something goes wrong there's no going back. You should build your talk into 4 or 5 pieces, where each piece could stand alone. Then if you fall behind, or something goes wrong, when the first slide for the next part comes up, you can recover.

- **Watch some Ignite (It's Elementary) talks!** Some of the best ignite talks get posted to the ignite show where you can see many different ways people use the format. Some good examples include:

  - Commutapult or Great Designers Steal

- **Use twice to emphasize a point.** Put the same slide twice if you want to have more time to make that point.

It's Elementary	Session Choice Ranking									
	3	4	5	6	7	8	9	10	11	12
Adams,Danielle					X					
Alicante,Gabrielle Kate,Cheng								X		
Banh,Daniel,Thien	X									
Berger,Gavriele,Elizabeth									X	
Betancourt,Lauren,Celena					X					
Chang,Connie				X						
Chauhan,Bhavya						X				
Cooper,Sydney						X				
Crowell,Abigail	X									
Dehmer,Emily				X						
Divino,Lily Ann,Mendoza	X									
Downes,Kathryn		X								
Farren,Aileen		X								
Garcia Sanchez,Alejandra,Paola							X			
Gerhardt,Rachel,Elise				X						
Glushkina,Jessica,Felicia									X	
Jervis,Finadayo,Damali									X	

Name	1	2	3	4	5	6	7	8	9	10
Jesani,Noreen										X
Juson,Sandra								X		
Luhm,Althea,Corinne										X
Macapagal,Kelsey,Leigh						X				
Oliver,Kaytlyn,Rae						X				
Pavlick,Nicole,Alexa							X			
Perez,Daisy,Carolina				X						
Ramchandani,Nishika					X					
Richmond,Allyson										X
Rivera,Clara,Marie						X				
Ronning,Anna			X							
Sangha,Ramandeep			X							
Simmons,Kimberly,A			X							
Torrey,Eleanor			X							
Verly,Frederique		X								
Wilks, (James) Alex										
Total Students: 33	3	3	4	4	3	3	3	3	3	3

Appendix F - Strategy Planning Retreat (Presentation Dates)

It is time for your hospital to renew its 5-year strategic plan. Your CEO has tasked you to be the organizers of a strategic planning retreat that will set the foundation for your hospital's next strategic planning cycle. The main point of this retreat is to focus on strategic planning and setting the priorities for the next 5 years. The management retreat is meant to include all senior- and mid-level management (no staff-level participants) and be held for 1 full day (don't forget that people like to eat well and be entertained during these retreats!). You have a budget of $25,000 to cover all expenses and you're expected to use all of it.

Your group's objectives are to develop a 25-minute in-class presentation that encompasses the following: (1) introduction to the hospital (e.g., are you an academic medical center, etc.) and the key pressures facing your hospital (you can make up a hospital or use an existing one), (2) prepare a detailed, 1-page agenda for the 1-day strategic planning retreat, (3) prepare a detailed, 1-page budget by line item for all expenses you expect to incur during the retreat, (4) lead the class in a strategic planning activity that is part of the agenda you created, and (5) summarize the results of your in-class activity and discuss how you can use them to address the challenges facing the hospital set forth in your introduction. Examples of strategic planning activities may include: SWOT analysis development, breakout groups focused on growing specific services, etc. However, you are **strongly** encouraged to be creative in developing your own activity. **Topics must be substantially different from week-to-week. In other words, if Group 1 performs a SWOT analysis on a health system, Groups 2-6 should NOT propose an exercise using a SWOT analysis.** Topics will be approved by the instructor prior the week prior to the presentation.

Please remember to include a thorough introduction to your organization that provides enough detail so the class understands the organizational setting (including any key external or competitive issues facing the hospital) and allow time for a short wrap-up/conclusion. The conclusion should synthesize the learnings from the class activity.

Individuals will self-select into groups based on the preferred date of presentation. The teams can (and should) be different from the SCP project groups, although some overlap may certainly occur. Class activity topics, and a draft of your retreat agenda, should be cleared with the course instructor **approximately 1 week prior to the date of your group's presentation**. The grading rubric for the presenting team is attached (Appendix C).

		Presentation Date	
TEAM1		Session 12	Apr 25
Banh,Daniel,Thien	dbanh@bu.edu		
Berger,Gavriele,Elizabeth	gberger@bu.edu		
Jesani,Noreen	njesani@bu.edu		
Macapagal,Kelsey,Leigh	kmacapag@bu.edu		
Richmond,Allyson	allysonr@bu.edu		
Sangha,Ramandeep	rsangha@bu.edu		
TEAM 2		Session 11	Apr 11
Alicante,Gabrielle Kate,Cheng	alicante@bu.edu		

Downes,Kathryn	downesk@bu.edu		
Oliver,Kaytlyn,Rae	kaytlyno@bu.edu		
Pavlick,Nicole,Alexa	npavlick@bu.edu		
Simmons,Kimberly,A	simmonkj@bu.edu		
Verly,Frederique	fverly@bu.edu		
TEAM 3		**Session 10**	**4-Apr**
Cooper,Sydney	sydneymc@bu.edu		
Jervis,Finadayo,Damali	fjervis@bu.edu		
Juson,Sandra	sjuson@bu.edu		
Murray,Kristen,Eileen	murrayk@bu.edu		
Perez,Daisy,Carolina	perezd@bu.edu		
Rivera,Clara,Marie	clarariv@bu.edu		
Wilks, (James) Alex	jawilks@bu.edu		
TEAM 4		**Session 9**	**Mar 28**
Adams,Danielle	dadams1@bu.edu		
Betancourt,Lauren,Celena	laurencb@bu.edu		
Chang,Connie	cschang@bu.edu		
Muthu,Shravanti	smuthu@bu.edu		
Ramchandani,Nishika	nishikar@bu.edu		
Ronning,Anna	aronning@bu.edu		
TEAM 5		**Session 8**	**21-Mar**
Divino,Lily Ann,Mendoza	ladivino@bu.edu		
Garcia Sanchez,Alejandra,Paola	ale17@bu.edu		
Gerhardt,Rachel,Elise	rgerhard@bu.edu		
Glushkina,Jessica,Felicia	jglush@bu.edu		
Luhm,Althea,Corinne	aluhm@bu.edu		
Torrey,Eleanor	etorrey@bu.edu		
TEAM 6		**Session 7**	**Mar 14**
Chauhan,Bhavya	bchauhan@bu.edu		
Crowell,Abigail	crowella@bu.edu		
Dehmer,Emily	edehmer@bu.edu		
Farren,Aileen	afarren@bu.edu		
Purcell,Lauren	laurenhp@bu.edu		

Appendix G - Strategic Consulting Project Teams and Sponsors

MARCH OF DIMES

Danielle Adams

Gabrielle K. Alicante

Kaytlyn Oliver

Nicole Pavlick

Daisy Perez

Kim Simmons

Eleanor Torrey

UPHAM'S CORNER

Daniel Banh

Gavi Berger

Lauren Betancourt

Lily Ann Divino

Fina Jervis

Allyson Richmond

GEL4MED

Connie Chang

Alejandra Garcia

Jessica Glushkina

Althea Luhm

Anna Ronning

Frederique Verly

Alex Wilks

BOSTON SIGHT

Bhavya Chauhan

Noreen Jesani

Kelsey Macapagal

Nishika Ramchandani

Clara Rivera

Ruby Sangha

BMC

Sydney Cooper

Abby Crowell

Emily Dehmer

Kathryn Downes

Aileen Farren

Rachel Gerhardt

Sandra Juson

Appendix H - Case Study Questions

Please answer all 6 questions assigned for each of the 3 cases you select.

Case 1: Cleveland Clinic

1. What is the Cleveland Clinic's overall strategy for improving value for patients? Identify the critical components and their rationale.
2. Where has the Clinic made the most progress?
3. What are the areas for improvement?
4. Identify and evaluate the Clinic's various approaches to growing its practice.
5. Which growth initiatives should the Clinic expand and why?
6. What other recommendations would you make to Dr. Cosgrove?

Case 2: Project ECHO: Expanding the Capacity of Primary Care Providers to Address Complex Conditions

1. What is Project ECHO?
2. What problems was Sanjeev Arora trying to solve with Project ECHO?
    a. And how did it address them?
3. How is the impact of Project ECHO measured?
4. In what ways might Project ECHO generate value?
    a. What evidence is needed to demonstrate value?
    b. Who should pay for Project ECHO in the US moving forward?
5. What enabled Project ECHO to expand?
    a. What constraints will Project ECHO face as it continues to scale up?
6. What does it means that Project ECHO can "touch 1 billion lives"?

Case 3: [Massachusetts Eye and Ear: Deciding Whether to Join Partners HealthCare](#)

1. What were the key changes in the U.S. health care system taking place at the time of the case?
2. What were the key drivers of consolidation in the provider market? Were there other causes that were not included in the case?
3. What were the pros and cons of joining Partners? Were there other alternative routes that Mass Eye and Ear (MEE) could have pursued (aside from joining Partners or remaining independent?
4. What factors prompted MEE to consider this decision?
5. If you were in Fernandez's shoes, how would MEE's status as a specialty hospital influence your decision making? How did MEE differ from a small independent general hospital?
6. What decision would you recommend? Why?

Case 4: [Humana's Bold Goal: 20 Percent Healthier by 2020](#)

1. Describe Humana and its company strategy. For example, briefly describe its:
    a. revenue and income position
    b. membership
    c. competitors and competitive market position
    d. enrollment by business line and by state

2. Humana's "Bold Goal" is to tackle the social determinants of health.
    a. Why is this important for individual patients? For communities?
    b. Why is this important to healthcare providers and health systems?
    c. Are there other stakeholders who are important in tackling the Bold Goal?
3. What led up to Humana's decision to launch its "Bold Goal"?
    a. What role did consumer trust play?
    b. What four areas of strategic focus did Humana undertake to build consumer trust?
    c. Describe the Behavioral Segmentation (Exhibit 5) undertaken by Humana to better understand how to motivate specific groups of beneficiaries.
    d. Describe the consumer experience metrics introduced into management evaluations (Exhibit 6).
4. What were the health barriers in communities that Humana hoped to address to improve clinical outcomes?
5. How did Humana involve its communities to define and build an inclusive Bold Goal program? What role did local Board of Directors (BOD) play? What role did Health Advisory Boards play?
6. According to (Exhibit 10), how has Bold Goal created value to Humana's business, consumers and associates?

BUSPH Academic Support Resources

There are many support resources available to BUSPH students, including [communication resources](#), a [writing guide](#), [academic support](#) and a [core course tutoring program](#). For more information, contact Mahogany Price at [sphtutor@bu.edu](#).

Public Health Writing Program

The Public Health Writing Program is available to SPH degree candidates who would like to discuss planning a paper, organizing a paper, writing clearly, or other aspects of the writing process. The program is not an editing service and does not guarantee that the assistant will be knowledgeable about content of the paper.

For more information or to schedule an appointment, please visit the program's website: [bu.edu/sph/writing](#). If you have any questions, please contact the Program Manager, Mahogany Price at [sphwrite@bu.edu](#).

Presentation Skills Appointments

Presentation skill appointments are available to SPH degree candidates looking to practice presentations and receive feedback from a peer coach on slides, poster presentations, speech outlines, and/or oral communication skills!

For more information or to schedule an appointment, please visit the program's website: [bu.edu/sph/present](#). If you have any questions, please contact the Program Manager, Mahogany Price at [sphwrite@bu.edu](#).

BUSPH Writing Guide

BUSPH Writing Guide ([bu.edu/sph/writing-guide](#)). The Guide includes components like writing strategies, communicating data, word choice, writing as a team, resources for non-native English speakers, and finding and using resources. In addition, there are explanations of several specific types of public health writing, including literature reviews, policy memos, reflections, and critiques. This Guide is designed to be a starting point for students and save you from having to answer basic questions about style and formatting.

BUSPH Library Tutorials

Librarians from the BU Alumni Medical Library created [BUSPH library tutorials](#), for students in the School of Public Health. The first is a brief overview of library resources followed by guidance on advanced searches using including PubMed, Web of Science, POPLINE, Google, etc. One this site you will also find tutorials on Mendelay and Zotero, which are free citation management programs, as well as on properly citing sources and avoiding plagiarism.

If you would like to make an appointment to meet with a librarian in person to get personalized assistance with a search you can contact them directly by email ([refquest@bu.edu](#)), phone (617 638-4228), or stopping by the reference desk on the 12th floor of the med school (Building L).