# **NYU Wagner logo**

# **HPAM-GP 1833.001 Health Services Management**

# **Spring 2021**

## Instructor Information

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* Office Address: Puck Building, \_\_\_\_
* Office Hours: via Zoom by appointment; please schedule by visiting [Calendly](https://calendly.com/professorsampson) or email

## Course Information

* Class Meeting Times: Wednesdays, 6:45–8:45 pm
* Class Location: ONLINE

## Course Prerequisites

* CORE-GP 1020 Managing Public Service Organizations
* HPAM-GP 1830 Introduction to Health Policy and Management

## Course Description

This course has two overall goals. The first is to develop students' skills in strategic thinking and strategic management. This part of the course focuses on questions of mission and vision ("What areas or activities should we be working in?") and on questions of strategy and operations ("How can we perform effectively in this area?"). We will focus mainly on strategy formation ("What should our strategy be?") and on the content of strategies (such as mergers), examining their strengths and weaknesses from a variety of perspectives.

The second goal is to prepare students to effectively design health care organizations to optimize their performance. Managers must ensure that their organizations are well-designed to deliver the results that their strategies promise. This entails developing knowledge and skills to analyze key issues in organizational structure, power and politics, culture, and, most importantly, to lead organizational change.

The course relies heavily on case studies and active learning from case analyses.

## Course Objectives

The three primary objectives of the course are to (1) introduce and apply analytic frameworks used to form organizational strategies; (2) integrate managerial and leadership skills acquired in other courses and through personal experience; and (3) introduce and apply models to promote students’ ability to design organizations for optimal performance and to implement strategies.

Thus, students who successfully complete this course will be able to:

1. Analyze complex community, sector and organizational situations from a general management point of view, using a comprehensive strategic framework;
2. Develop and/or identify potential alternative strategies for pursuing organizational mission and vision and for working with diverse stakeholders to achieve shared goals;
3. Assess the implications of strategic options, including potential for achieving advantages and for effective implementation, for satisfying the values and needs of a variety of stakeholders;
4. Work effectively with colleagues in bringing multiple perspectives and diverse skills together to produce innovative solutions to complex challenges;
5. Make, support analytically, and communicate clearly strategic decisions from a managerial and leadership perspective
6. Increase skills in diagnosis to enable analyses of organizational structures, power and politics, and culture, with a focus on the interplay of rules, resources, and relationships
7. Identify critical sources of tension in organizations, and learn to harness them to produce beneficial outcomes for you and your organization
8. Build a repertoire of strategies and tactics to increase effectiveness in leading organizational change initiatives and implementing new strategies

## Competencies Addressed in the Course

I will use the assignments, participation in class via the case study discussions in this course to assess progress against the competencies listed below. No student will receive a B or higher without demonstrating satisfactory progress toward mastery of each competency. The level of competency expected to be achieved is denoted in brackets according to the following key:

 [1] = Basic: Foundational understanding of knowledge/skill/competency

 [2] = Intermediate: Student demonstrates greater depth of understanding of this

knowledge/skill/competency and can use this ability to analyze a problem

 [3] = Advanced: Student demonstrates expertise in this knowledge/skill/competency

and can use this ability to evaluate, judge, and synthesize information

### **Learning Assessment Table**

| **Program Competency**  | **Corresponding Course Learning Objective** | **Corresponding Assignment Title**  | **Level of Competency Expected to Achieve via the Assignment**  |
| --- | --- | --- | --- |
| The ability to manage teams, projects and people; to work in change-oriented healthcare organizations; and mentor a diverse and changing workforce | #4, #5, #8 | Memo, Case Study Discussion, Final Project | 2 |
| The ability to understand and apply legal and ethical principles to managerial and leadership decisions affecting healthcare organizations | #1, #6 | Memo, Case Study Discussion, Class Participation | 1 |
| The ability to align human resource capacity and practices and processes with strategic organizational goals | #6 | Memo, Case Study Discussion, Final Project | 2 |
| The ability to hold people accountable to standards of performance and assure organizational, professional and ethical compliance | #5 | Memo, Case Study Discussion, Class Participation | 3 |
| The ability to measure, monitor and improve safety, quality, access and system care delivery processes in healthcare organizations | #6, #8 | Memo, Case Study Discussion, Class Participation | 2 |
| The ability to assess population and community health needs from a public service perspective | #1 | Memo, Case Study Discussion, Final Project | 1 |
| The ability to draw implications and conclusions to develop an evolving vision that leads to organizational viability | #2, #6, #7 | Memo, Case Study Discussion, Class Participation  | 2 |
| The ability to use information systems and evidence-based management principles for problem-solving, strategic planning and decision-making, and measuring change | #6, #8 | Memo, Case Study Discussion, Class Participation  | 3 |
| The ability to synthesize evidence, and apply statistical, financial, economic and cost effectiveness methods in organizational analysis | #1, #3, #6 | Memo, Case Study Discussion, Final Project | 2 |
| The ability to communicate and interact productively in a diverse and changing industry, workforce and citizenry | #4 | Memo, Case Study Discussion, Class Participation  | 3 |
| The ability to present convincingly to individuals and groups the evidence to support a point of view, position or recommendation | #4, #5 | Final Project | 3 |
| The ability to engage in continuous learning; to reflect on and assess one’s strengths and developmental needs; to seek feedback from others; and establish and sustain a professional development network | #8 | Memo, Class Participation | 1 |

**Course Philosophy**

My teaching philosophy centers on the collective knowledge and diversity of thought and experience within the classroom. Our main aim is to share this collective in the learning experience and build on the knowledge base that you have already accumulated. We must first accept that there is not a single right answer in social science. We will develop the psychological safety to fully participate. Know that we will arrive at different conclusions based on the information available to us, the decision frameworks that we have already developed, and our world view and preferred learning style. I insist that you be open to learning from your classmates, and this learning works best when we work collaboratively in teams. Therefore, in this course, we will work in teams synchronously and asynchronously to deepen our understanding of the selected material. You must be an active participant to maximize the benefit.

## Readings

I require that students must be prepared for class discussions and participate fully without exception. Think critically about the assigned material and make connections to what you already know. You will be encouraged to share your own experiences relevant to the topics and cases we will explore.

The series of case studies and other required readings will be available on the Classes site for the course.

We will also read several chapters from the textbook [**Strategic Management of Health Care Organizations,**](http://proxy.library.nyu.edu/login?url=http://proxy.library.nyu.edu/sso/skillport?context=139096) **Eighth Edition (2018)** by Ginter, Duncan, and Swayne; these chapters are available from the online NYU Library (e-books).

## Course Requirements

There are three basic requirements for the course:

### Class Participation (20%):

Your active participation is critical in this course. Productive discussion depends on students reading and analyzing the materials beforehand and coming to class ready to present a diagnosis of the problems presented and possible solutions. Students are expected to attend all classes, have thoroughly prepared the assigned cases and readings, participate fully in small group and class discussions, and act as group spokesperson for case presentations.

Students are expected to attend and participate in Live Sessions by interacting with the instructor and classmates. The following point values will be earned based on consideration of the criteria below.

| CRITERIA  | **0 points** | **50 points** | **62 points** | **75 points** | **87 points** | **100 points** |
| --- | --- | --- | --- | --- | --- | --- |
| Students are expected toAttend all live sessions and interact with the instructor and classmates | Student does not attend live sessions | Student attends some live sessions but does not interact with the instructor and classmates. | Student attends most live sessions but does not interact with the instructor and classmates. | Student attends all live sessions and demonstrates minimal interaction with the instructor and classmates by participating on occasion. | Student attends all live sessions and demonstrates moderate interaction with the instructor and classmates by participating frequently. | Student attends all live sessions and demonstrates high quality interaction by frequently responding to the instructor and classmates with valuable, relevant contributions. |

### Written case analyses (45%):

Each student will complete an individual, written case memo that analyses a case and provides recommendations for dealing with issues presented in the case. **The requirements for the case analysis are described below as Assignment 1.**

### Team project (35%):

Students will be assigned to work in teams and do a strategic analysis of an organization. Each team will submit a comprehensive analysis with strategic recommendations; teams will present their projects and recommendations in class on the last day of the term. **The requirements for the team project are described below in Assignment 2.**

All submitted papers, whether individual or group, must be original work with full and complete citations of any materials drawn from other sources [articles, books, interviews, etc.] using Chicago style (author/date format).

## COURSE POLICIES

### Attendance.

You must log in to class on time. Any absence must be explained and justified beforehand; your grade will be lowered if you do not do so.

### Late assignments.

All assignments must be submitted on the stated due dates unless I grant an extension before the due date.

I will only grant extensions in case of a real emergency out of respect for those who abide by deadlines despite their hectic schedules. Late submissions will be penalized by a half letter grade per day (e.g., B+ to B). However, any submission more than three days late will receive a grade of zero (Do not let this happen to you).

### Students with disabilities.

Any students requiring accommodation should contact me to make proper arrangements. Please be prepared to share your documentation from the NYU disabilities office.

## Course Session Calendar

* Week 1
	+ Date: February 3
	+ Topic: Introduction to the course
* Week 2
	+ Date: February 10
	+ Topic: Building blocks: Mission, vision, strategy and strategic thinking
* Week 3
	+ Date: February 17
	+ Topic: Strategy formation: Assessing the external environment
* Week 4
	+ Date: February 24
	+ Topic: Strategy formation: Assessing your organization
* Week 5
	+ Date: March 3
	+ Topic: Current strategies
* Week 6
	+ Date: March 10
	+ Topic: Current strategies (cont’d)
* Week 7
	+ Date: March 17
	+ Topic: Putting it all together
* Week 8
	+ Date: March 24
	+ Topic: Reward and incentive systems
* Week 9
	+ Date: March 31
	+ Topic: Formal structure
* Week 10
	+ Date: April 7
	+ Topic: Performance management systems
* Week 11
	+ Date: April 14
	+ Topic: Organizational culture
* Week 12
	+ Date: April 21
	+ Topic: Emerging organizations: Accountable Care Organizations and Patient-Centered Medical Homes (primary care initiatives)
* Week 13
	+ Date: April 28
	+ Topic: Leading organizational change I
* Week 14
	+ Date: May 5
	+ Topic: Leading organizational change II

## Course Schedule and Assignments

### **Class 1: Introduction**

#### Learning objectives

* To define the nature and scope of the course, including the basic conceptual framework and approach
* To explore the basic course themes of strategy, strategic thinking, and strategic planning

#### Readings

* Michael E. Porter, “What Is Strategy?” Harvard Business Review: Nov/Dec 1996: 61-78.
* Carlos Rey, Nuria Chinchilla, Nuno Pitta, “Objectives are SMART, missions are WISE” IESE Insight Review, Issue 33, second quarter, 2017.
* **Case 1: Paul Levy: Taking Charge of the Beth Israel Deaconess Medical Center (Multimedia Case) V2**

**Come to class with answers to the following questions based on the Beth Israel Deaconess Medical Center (BIDMC) Case.**

1. How would you describe the situation that Paul Levy inherited at the BIDMC What challenges did he face? Why did previous turnaround efforts fail?
2. How did Levy get started in his new job? In particular, what were his objectives and what did he accomplish:
	1. Prior to his first day of work?
	2. On his first day?
	3. During his first week?
3. What (if anything) was distinctive about the way Levy went about formulating, announcing, and implementing the recovery plan? How did he overcome resistance?
4. How did Levy tackle the problem of the BIDMC’s “curious inability to decide?”
5. In describing his leadership style, Levy speaks of the “CEO as teacher.” How has he defined that role? Why has he chosen to focus on it? What skills does it require? In what settings is it likely to be useful? Will Levy have to assume a new role (0r roles) in the months ahead?

### **Class 2: Building Blocks: Mission, Vision, Strategy and Strategic Thinking**

#### Learning objectives

* To demonstrate the process of strategic thinking in a complex setting involving external, organizational and interpersonal challenges
* To introduce the central concepts of mission and vision in the development of organizational strategy
* To distinguish strategic thinking from planning
* To understand the role of leadership in strategy

#### Readings

* Bradley et al., “Managing the Strategy Journey” McKinsey Quarterly, July 2012
* Frank Vermeulen, “Five Strategy Questions Every Leader Should Make Time For” Harvard Business Review, September 3, 2015
* Chapter 5,”Directional strategies” [Strategic Management of Health Care Organizations,](http://proxy.library.nyu.edu/login?url=http://proxy.library.nyu.edu/sso/skillport?context=139096) Eighth Edition (2018), Ginter, Duncan, and Swayne, John Wiley & Sons
* **Case 2: Shriners Hospital for Children**

**Come to class with answers to the following questions based on the Shriners Hospital for Children Case.**

1. What is the unique governance structure of SHC?
2. What is the SHC’s current strategy?
3. What caused SHC to be in its current precarious financial position?
4. Who are the parties impacted by SHC’s existing situation? What impact could these financial challenges have in the short and long term?
5. Evaluate the options being considered by SHC management. Are there any other actions they should explore?
6. *How should SHC management position their recommendations to get approval from the 1,400 delegates?*

### **Class 3: Developing Strategy: Assessing the External Environment**

#### Learning objectives

* To develop a practical framework for assessing external opportunities and threats and internal strengths and weaknesses in the context of organizational mission
* To understand how the basic economic phenomena of resource scarcity and competition define the need for strategy
* To understand the core functions of ‘competitors’, ‘customers’, ‘holder of resources’, ‘referee’, and ‘allies’ in a strategic context

#### Readings

* Chapter 2 “External Analysis” and Chapter 3 “Service Area Competitor Analysis” in [Strategic Management of Health Care Organizations,](http://proxy.library.nyu.edu/login?url=http://proxy.library.nyu.edu/sso/skillport?context=139096) Eighth Edition (2018), Ginter, Duncan, and Swayne, John Wiley & Sons
* Kaissi, A. A., & Begun, J. W. (2008). Fads, fashions, and bandwagons in health care strategy. *Health Care Management Review*, 33 (2), 94102.
* Daemmrich, A (2016). “Using the SWOT Framework in the Healthcare Sector” Ivey Publishing
* **Case 3 (for memo #1):** ThedaCare: System Strategy Due 6:00pm February 17, 2021

### **Class 4: Developing Strategy: Internal Organizational Assessment**

#### Learning objectives

* To understand the role of key characteristics of organizations, including their strengths and weaknesses, in evaluating the potential effectiveness of strategic options
* To be able to define the underlying ‘business’ or operational and economic models of an organization’s major activities
* To define clearly and distinguish the three levels of strategic thinking: Conceptual, analytical, and operational

#### Readings

* Chapter 4,”Internal Analysis and Competitive Analysis” [Strategic Management of Health Care Organizations,](http://proxy.library.nyu.edu/login?url=http://proxy.library.nyu.edu/sso/skillport?context=139096) Eighth Edition (2018), Ginter, Duncan, and Swayne, John Wiley & Sons
* **Case 4: When Competition Isn’t Enough: Rural Health in Southwest Virginia (A)**

**Come to class with answers to the following questions based on the Southwest Virginia case**

1. What is at stake for the residents of SW Virginia? How would you describe the problem from their perspective? How do you know?
2. Consider the interests of Seidman and Levine. What are the obligations of each one with regard to the public? What do they say they want?
3. Consider the report of the SVHA, and the excerpts from the report from Robert Town as provided to the Commonwealth of Virginia. How could these reports be so different? Who is right?

### **Class 5: Strategy as Content**

#### Learning objectives

* Understand the strengths and weaknesses of key strategies
* Know empirical evidence to support use of strategies
* Know current use of strategies

#### Readings

* Tsai & Jha, “Hospital Consolidation, Competition, and Quality Is Bigger Necessarily Better?” JAMA, July 2014
* Chapter 6 “Identifying Strategic Alternatives” [Strategic Management of Health Care Organizations,](http://proxy.library.nyu.edu/login?url=http://proxy.library.nyu.edu/sso/skillport?context=139096) Eighth Edition (2018), Ginter, Duncan, and Swayne, John Wiley & Sons
* **Case 5: Health City Cayman Islands**

**Come to class with answers to the following questions based on the Health City Cayman Islands case**

1. The case gives an overview of NH Operations in India. Why is this relevant and why are they successful in India?
2. HCCI expects patients from the Caribbean Islands, US and South America. To what extent, if at all, should HCCI consider adapting the NH model developed in India?
3. The CABG procedure – one of the most common cardiac procedures – would cost a patient from the Caribbean about $10,000 in the NH hospital in Bangalore, India, and about $100,000 in hospitals in Miami, FL (cost = hospital + travel and lodging for patient and companion). What should be the price of the CABG at HCCI? Why?

### **Class 6: Strategy as Content –Cont’d**

#### Learning objectives

* Understand the strengths and weaknesses of key strategies
* Know empirical evidence to support use of strategies
* Know current use of strategies

#### Readings

* Dyer, J. H., Kale, P., & Singh, H., “When to Ally and When to Acquire,” Harvard Business Review, July-August 2004, pp.108-115
* Kale, P. & Singh, H. “Managing Strategic Alliances: What Do We Know, and Where Do We Go from Here? Academy of Management Perspectives, 2009.
* Offodile, A. C., & Ho, V. (2018). Making “Cents” for the Patient: Improving Health Care through Consumerism. *Issue Brief*, *3*.
* Shrank, W.H., Primary care practice transformation and the rise of consumerism. *Journal of General Internal Medicine,* April 2017, Volume 32, Issue 4, pp 387–391
* **Case 6 for memo #2: Napo Pharmaceuticals: The Triple Bottom Line of People, Planet and Profits (A) 2014 Due 6:00pm March 10th 2021**

### **Class 7: Putting it All Together**

#### Learning objectives

* Understand the importance of portfolio analysis
* Know how to use the MacMillan Matrix to decide what strategies to use (and not use) for your organization’s divisions (portfolio analysis)
* Be able to develop a comprehensive diagnostic approach for conducting a complete strategic review of an organization in its full internal and external context

#### Readings

* Chapter 7: “Evaluation of Alternatives and Strategic Choice” [Strategic Management of Health Care Organizations,](http://proxy.library.nyu.edu/login?url=http://proxy.library.nyu.edu/sso/skillport?context=139096) Eighth Edition (2018), Ginter, Duncan, and Swayne, John Wiley & Sons
* HBR. Strategic Decision Making in Healthcare Organizations by David Young 2016

### **Class 8: Reward and incentive systems**

#### Learning Objectives

* Understand the strengths and weaknesses of financial and non-financial incentives and reward systems
* Understand the issues involved in current pay-for-performance plans in health care
* Understand the relationship of incentive and reward systems to other key aspects of organizational design

#### Readings

* McKethan & Jha, Designing Smarter Pay-for-Performance Programs JAMA. Published online November 06, 2014.
* Recommended: Damberg, Sorbero, Lovejoy, Martsolf, Raaen & Mandel Measuring Success in Health Care Value-Based Purchasing Programs: Findings from an Environmental Scan, Literature Review, and Expert Panel Discussions. RAND, 2014 (p.1-35).
* **Case** 7**: Lincoln Electric in China.**

Lincoln Electric is perhaps the most famous case of incentive structures. It makes a sharp argument in favor of some controversial ways of designing compensation systems and motivating employees. As we shall see, Lincoln and others have long used such reward systems with some interesting results. Come to class prepared to take a position on the reward system.

### **Class 9: Formal structure**

#### Learning objectives

* Know major structural approaches to coordination and control in organizations
* Understand the strengths and weaknesses of formal structures
* Be able to recommend alternative formal structures to deal with common coordination and control problems

#### Readings

* James BC, Savitz LA. How Intermountain trimmed health care costs through robust quality improvement efforts. Health Affairs. 2011; 30(6): 1185-1191.
* Optional: Organization Design. Leatt, Baker & Kimberly
* Optional: If Health Care Is Going to Change, Dr. Brent James's Ideas Will Change It – New York Times November 8, 2009 Making Health Care Better, David Leonhardt
* **Case 8: Intermountain Health Care**. case number 603066.

Formal organizational structures are not just descriptions of information flows and reporting relationships. They are tools for achieving coordination of activities. Hence many organizations undertake frequent reorganizations to improve their effectiveness. This week we will look at formal ways of coordinating organizational activities for accomplishing work tasks. We will focus on some basic dimensions of organizational design, as well as on strengths and weaknesses of the most common formal structures.

### **Class 10: Performance Measurement**

#### Learning objectives

* To examine the ‘stepdown’ process from mission to operations and to be able to develop key performance indicators
* To be able to understand and use the balanced scorecard as a performance management tool for monitoring the effective implementation of vision and strategy

#### Readings

* Kaplan, R.S. & Norton, D., “Using the Balanced Scorecard as a Strategic Management System, Harvard Business Review, 1996
* Simons, R. S., “Stress-Test Your Strategy: The 7 Questions to Ask,” Harvard Business Review, November 2010, pp.92-100
* Kaplan, R.S. “The Balanced Scorecard for Public-Sector Organizations,” Balanced Scorecard Report.
* *Marcotte, B.J. et al. “U.S Health Care Reform Can’t Wait for Quality Measures to be Perfe*ct”. Harvard Business Review, October 2017
* **Case 9 for memo #3: Montefiore Medical Center Due 6:00pm April 7th 2021**

### **Class 11: Organizational culture**

#### Learning objectives

* Know what organizational culture is and is not, including the major elements of culture
* Know how organizational culture can affect organizational performance
* Understand how to change organizational culture

Introduction. There are probably more definitions of culture than there are people studying it. Culture is an elusive concept, but one with tremendous face validity—everyone understands what culture is, but that understanding is often vague and fuzzy. This week we will discuss one useful model of culture and see how it helps us understand key challenges facing a major children’s hospital.

#### Reading

* Schein, E.H. 1990. “Organizational Culture”. American Psychologist.
* Traphagan, John. "We're Thinking About Organizational Culture All Wrong." *Harvard Business Review* 6 (2017).
* Case 10: Children’s Hospital and Clinics (A) A.C. Edmondson, M.A. Roberto & A. Tucker. Harvard Business Publishing, 2001 (revised 2007); case number 302050.

### **Class 12: Emerging organizations: Accountable Care Organizations and Patient-Centered Medical Homes**

#### Learning objectives

* Know current approaches to re-organize primary and acute care
* Know strengths and weaknesses of current designs, including outcomes

#### Readings

* Dryda, L. How health systems are confronting the retail revolution in healthcare. *Becker’s Hospital Review* March 2020 https://www.beckershospitalreview.com/strategy/how-health-systems-are-confronting-the-retail-revolution-in-healthcare.html
* D’Aunno, T., Broffman, L., Sparer, M. & Kumar, S. Factors that Distinguish High-Performing Accountable Care Organizations in the Medicare Shared Savings Program. Health Service Research, December 2016. DOI: 10.1111/1475-6773.12642
* Sinaiko et al., Synthesis of Research on Patient-Centered Medical Homes Brings Systematic Differences into Relief. Health Affairs, 36(3), 2017.
* **Case 11 Implementing a Patient-Centered Medical Home on Mount Desert Island**

### **Class 13: Leading organizational change**

#### Learning objectives

* Know key principles and practices for leading organizational change
* Understand the strengths and weaknesses of major approaches to organizational change
* Understand sources of resistance to change and how to address them
* Understand how successful organizational change rests on an effective diagnosis of an organization, drawing on key concepts from the course

#### Readings

* Kotter, J. P. 1995. Leading Change: Why Transformation Efforts Fail. Harvard Business Review Vol. 73 Issue 2, 59-68.
* Pearce JA, Robbins DK “Strategic transformation as the essential last step in the process of business turnaround” *Business Horizons* 2008 (51); 121-130
* **Group Case (12): Strategic Change at Whitman-Walker Health**

## Assignments

### Assignment 1: Case Analysis Memo

#### Purpose and requirements

You will complete an individual case analysis that provides an opportunity to develop your skills

in assessing an organizational situation and providing support for a particular course of

recommended action. This assignment will be in the form of a memo addressed to the

executive director of the focal organization, not to exceed 2 single spaced pages. The memo

must identify the problem as you see it, recommend solutions, and provide support for your

perspective.

State one problem presented by the case and briefly explain the context in which key decisions

must be made. Next, describe and assess proposed solutions to the problem, which you believe is the best course of action, and your reasons. Identify the next steps if your proposed solution is adopted and outline a “Plan B” in the event that your proposed solution fails. Show how the

readings informed your understanding of the case and influenced your decision-making.

Do not attempt to address every issue in the case; focus on your analysis of the problem and

propose a potentially viable solution. Here is the outline I would like you to use:

#### Memo outline

* Executive Summary
	+ Open with a brief one-paragraph summary
	+ What is the context, key issue(s), and your recommendation?
* Background
	+ Why are we facing these issues? Identify root causes.
* Recommendations
	+ What are your specific recommendations? Rationale? Alternatives?
* Next steps
	+ How should your recommendations be implemented? What are the priorities? What is the timeline and what resources are required? Who is responsible for each step of this implementation plan?

Please use a simple and direct style, putting your conclusion or recommendation in the first

paragraph. List references, if necessary, on a concluding page.

#### Requirements

Page and format requirements: 2 pages, single spaced including all graphics. Use

Times New Roman font with 1-inch margins (looks count) and a 12-point font size. References should be included on a separate, final page of the document in Chicago Author/Date format.

#### Mechanics

Format, grammar, punctuation, spelling, and citation accuracy all count.

### Assignment 2 (Final Project): Team Case Analysis

Because strategy is so often formulated in groups, members of the class will be divided into teams for this assignment. This will allow you to develop awareness of how strategic decision-making works. This project will provide an opportunity to apply what you have learned to a case. Your team will be “hired” as a consultant to tackle a strategic problem or address an opportunity to improve the work of the organization featured in the case. Using the tools and concepts introduced in the course you will provide the organization’s management team with a 5-page (single-spaced) report that analyzes the situation and recommendations on how to move forward.

Prepare a concise analysis of the case that is responsive to the following points:

* What are the issues [strategic, tactical, and/or operational] that are presently confronting the organization or institution described in the case?
* What are the conceptual factors [mission, values, vision] that are relevant to these issues?
* What are the external/environmental factors that are relevant to these issues?
* What are the internal factors [structure, processes, people] that are relevant to these issues?
* What is the strategic intent of the institution?
* What alternative strategies would you consider, and which would you recommend/select if you were responsible for the institution? Why?
* What are the 3-4 most significant/first priority actions that you would have to take to implement your recommended strategy effectively?
* How would you “sell” your approach to the senior management of the institution?

See the rubrics on NYU Classes for how these assignments will be assessed.

## Extra Credit (Only opportunity)

Participate in a blind peer-review of your Case Memo 1. More details in first class. Your submission will be due the same day as your graded submission of Case Memo 1.

## Academic Integrity

Academic integrity is a vital component of Wagner and NYU. All students enrolled in this class are required to read and abide by [Wagner’s Academic Code](https://wagner.nyu.edu/portal/students/policies/code). All Wagner students have already read and signed the [Wagner Academic Oath](https://wagner.nyu.edu/portal/students/policies/academic-oath). **Plagiarism of any form will not be tolerated and students in this class are expected to report violations to me**. If any student in this class is unsure about what is expected of you and how to abide by the academic code, you should consult with me.

## Henry and Lucy Moses Center for Students with Disabilities at NYU

Academic accommodations are available for students with disabilities. Please visit the [Moses Center for Students with Disabilities (CSD) website](https://www.nyu.edu/students/communities-and-groups/students-with-disabilities.html) and click on the Reasonable Accommodations and How to Register tab or call or email CSD at (212-998-4980 or mosescsd@nyu.edu) for information. Students who are requesting academic accommodations are strongly advised to reach out to the Moses Center as early as possible in the semester for assistance.

## NYU’s Calendar Policy on Religious Holidays

[NYU’s Calendar Policy on Religious Holidays](https://www.nyu.edu/about/policies-guidelines-compliance/policies-and-guidelines/university-calendar-policy-on-religious-holidays.html) states that members of any religious group may, without penalty, absent themselves from classes when required in compliance with their religious obligations. Please notify me in advance of religious holidays that might coincide with exams to schedule mutually acceptable alternatives.