



NYU

**ROBERT F. WAGNER GRADUATE
SCHOOL OF PUBLIC SERVICE**

**HPAM-GP 1833.001
Health Services Management
Spring 2022**

Instructor Information

- Carla Jackie Sampson, Ph.D., MBA, FACHE
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 - Office Address: Puck Building, 3077
 - Office Hours: By appointment (including evenings and weekend); find a mutually convenient time by visiting <https://calendly.com/professorsampson>
- N.B. Each student is required to visit during the first two-three weeks of this term, even if all is well.

Course Information

- Class Meeting Times: Wednesdays, 6:45–8:45 pm
- Class Location: Room:LC2 [Tisch Hall \(TISC\), 40 West 4th Street, New York, NY 10012](#)

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, Team Projects	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, Team Project 1	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 Current Topic presentation Team Project 1	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	Current Topic Team Project 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. Then, we will develop the psychological safety to fully participate in a variety of ways. 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, as you would in this profession. 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. We establish this learning community by getting to know each other in the first class meeting.

Readings

I require that students must be prepared for class discussions and participate fully without exception. You must 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 Brightspace site for the course.

We will also read several chapters from the textbook **Strategic Management of Health Care Organizations, Eighth Edition (2018)** by Ginter, Duncan, and Swayne; these chapters are available from the online NYU Library (e-books).

Course Requirements

There are five basic requirements for the course:

Class Participation (15%):

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 to Attend 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.

Current Topic Individual Presentation (5%)

Each student will complete an individual class presentation (and write up) that discusses a current topic affecting the healthcare landscape. **The requirements for the current topic presentation are described below as Assignment 1.**

Written case analyses (35%):

Each student will complete two individual, written case memos 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 2.**

Team project 1 (10%)

Teams of students will select a Community Health Needs Assessment (CHNA) published by a tax-exempt hospital (as part of the CHNA community benefit requirement defined by the Internal Revenue Service) and critique that CHNA. **The requirements for the case analysis are described below as Assignment 3.**

Team project 2 (35%):

Students will be assigned to work in teams and do a strategic analysis of an assigned 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 4.**

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/arrive 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 you ask for (and I agree to 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

(Module #) Date	Topic	Assignment
(1) 1/26/22	Introduction and Introductions	
(2) 2/02/22	Building Blocks: Mission, Vision, Strategy, and Strategic Thinking	
(3) 2/09/22	Developing Strategy: Internal Organizational Assessment	Current Topic A
(4) 2/16/22	Developing Strategy: Assessing the External Environment	Case 1 due Current Topic B
(5) 2/23/22	Key Considerations for the Future of Health Services Management: New Business Models	Current Topic C
(6) 3/02/22	Key Considerations for the Future of Health Services Management: Technology & Virtual Health	Current Topic D
(7) 3/09/22	Key Considerations for the Future of Health Services Management: Anchor Mission Strategy and Community Benefit	Current Topic E Team Project 1 due
3/16/22	Spring Break	
(8) 3/23/22	Key Considerations for the Future of Health Services Management: Workforce and Wellness	Current Topic F
(9) 3/30/22	Equity and Ethics	Current Topic G
(10) 4/06/22	Reimagining Healthcare Delivery	Current Topic H
(11) 4/13/22	Predicting Roadblocks	Case 2 due Current Topic I
(12) 4/20/22	Putting it All Together	Current Topic J
(13) 4/27/22	Inclusive Leadership and Leading Organizational Change	Current Topic K
(14) 5/04/22	Team Project Presentations	Team Project 2 Due

Course Schedule and Assignments

Class 1: Introduction

Learning objectives

- To establish our learning community.
- 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

- **View this [Ted Talk from Herminia Ibarra](#) and this [Ted Talk from Mark Bowden](#)**
- 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.
- **Eric Van Den Steen, “Strategy and Strategic Thinking” Harvard Business Review Jan 2021**
- **Case 1: Paul Levy: Taking Charge of the Beth Israel Deaconess Medical Center (Multimedia Case) V2. (These materials will be a touchstone for the entire semester.**

For this class meeting, be prepared to answer the following questions:

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:
 - a. Prior to his first day of work?
 - b. On his first day?
 - c. 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.”
 - a. How has he defined that role?
 - b. Why has he chosen to focus on it?
 - c. What skills does it require?
 - d. In what settings is it likely to be useful?
 - e. Will Levy have to assume a new role (or 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

- Chapter 5, "Directional strategies" [Strategic Management of Health Care Organizations](#), Eighth Edition (2018), Ginter, Duncan, and Swayne, John Wiley & Sons
- **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**
- **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](#), 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.**
- **Daemrich, A (2016). “Using the SWOT Framework in the Healthcare Sector” Ivey Publishing**
- Optional or Reference: American Hospital Association [2022 Environmental Scan](#)
- **Case 3 (for individual memo #1): ThedaCare: System Strategy Due 9:00pm February 15, 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](#), Eighth Edition (2018), Ginter, Duncan, and Swayne, John Wiley & Sons
- **Case 4: [Wichita County Health Center: Strategic Planning](#)**

Come to class with answers to the following questions based on the Wichita County Case

1. What are WCHC’s key strengths, opportunities, weaknesses, and threats (SWOT)?
2. Should WCHC align with Centura? If yes, under what terms? If no, what opportunities should WCHC pursue independently?

Class 5: New Business Models

Learning objectives

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

Readings

- Chapter 6 “Identifying Strategic Alternatives” [Strategic Management of Health Care Organizations](#), Eighth Edition (2018), Ginter, Duncan, and Swayne, John Wiley & Sons
- **Phares, Jonathan, David D. Dobrzykowski, and Jodi Prohofskey. "How policy is shaping the macro healthcare delivery supply chain: The emergence of a new tier of retail medical clinics." Harvard Business Review**
- **Berchuck, C. A. "New hospitalist model for managing high-cost, high-need patients." Harvard Business Review Digital Article. 10/9 (2018).**
- **Licurse, M. D. A. "What retail can teach health care about digital strategy." Harvard Business Review (2018).**
- Dryda, L. [How health systems are confronting the retail revolution in healthcare](#). *Becker's Hospital Review* March 2020
- Tsai & Jha, “[Hospital Consolidation, Competition, and Quality Is Bigger Necessarily Better?](#)” *JAMA*, July 2014
- [Health Care In 2021: Five Trends To Watch](#)", *Health Affairs Blog, January 20, 2021.*
- [2022 Global Healthcare Outlook: Deloitte](#) pp 3-4: 26-29
- **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: Technology & Virtual Health

Learning objectives

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

Readings

- **Ikram, U., S. Gallani, J. F. Figueroa, and T. W. Feeley. "4 Strategies to Make Telehealth Work for Elderly Patients." Harvard Business Review (2020).**
- **Blumenthal, D. "Where telemedicine falls short." Harvard Business Review (2020).**
- **Chen, Shirley X. and Mitesh S. Patel "Digital Health Tools Offer New Opportunities for Personalized Care" Harvard Business Review (2020)**
- **Marchalik, Daniel. "Put Doctors at the Center of Health Care Tech" Harvard Business Review (2020)**
- **Walsh, Mike. "How to Navigate the Ambiguity of a Digital Transformation" Harvard Business Review (2021)**
- [2022 Global Healthcare Outlook: Deloitte](#) pp 26-36
- **Tapscott, Don, and Alex Tapscott. "What Blockchain Could Mean for Your Health Data" Harvard Business Review (2020)**
- **Case 4: Carolinas Healthcare System: Consumer Analytics**

Come to class with answers to the following questions based on the Carolinas Health System Case

- (1) Why has CHS invested in DA?
- (2) How successful has DA been so far? Why?
- (3) What are Dolin's most important challenges going forward?
- (4) Which organizations are best placed to provide integrated data management for individual patients?

Class 7: Anchor Mission Strategy and Community Benefit: Is Community Health Needs Assessment the S in ESG?

Learning objectives

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

Readings

- Shulman, Haley and Bill Hemmer. "[American Hospital Association Releases Its Most Recent Community Benefit Report Applicable To Tax-Exempt Hospitals.](#)" Withum, (January 2021).
- Oostra, Randy. "Embracing an Anchor Mission: ProMedica's All-In Strategy" Democracy Collaborative, (May 2018).
- Koh, Howard K., Amy Bantham, Alan C. Geller, Mark A. Rukavina, Karen M. Emmons, Pamela Yatsko, and Robert Restuccia. "Anchor institutions: best practices to address social needs and social determinants of health." *American journal of public health*, 110, no. 3 (2020): 309-316.
- Henisz, Witold, Tim Koller, and Robin Nuttall. "[Five ways that ESG creates value.](#)" McKinsey & Company, (November 2019).
- **Optional Case 6** "Anchoring Health Beyond Clinical Care: UMass Memorial Health Health Care's Anchor Mission Project." Harvard Business School, (2019).
- **Team Project 1** Due 9:00pm March 8, 2021

SPRING BREAK

Class 8: Workforce and Wellness

Learning objectives

- Understand the strengths and weaknesses of key strategies
- Know empirical evidence to support use of these strategies
- Know current use of strategies
- Assess the potential for achieving advantages and for satisfying the values and needs of a variety of stakeholders

Readings

- **Pfeffer, Jeffrey. “Could We Manage Not to Damage People’s Health” Harvard Business Review (2011!!)**
- Arabadjis, Sarah and Erin Sullivan. “How One California Medical Group Is Decreasing Physician Burnout”. Harvard Business Review (2017)
- **Kerns, Christopher and Dave Willis “The Problem with U.S. Health Care Isn't a Shortage of Doctors” Harvard Business Review (2020)**
- **Rees, Caroline and Robert Eccles “Quantify Your Company's Impact on People’ Harvard Business Review (2020)**
- **[2022 Global Healthcare Outlook: Deloitte](#) pp 20-25**
- Nyweide, David J., Woolton Lee, and Carrie H. Colla. “Accountable Care Organizations’ Increase in Nonphysician Practitioners May Signal Shift For Health Care Workforce.” *Health Affairs*, 39, no. 6, (2020):1080–86.
- **Case 5: Johnson and Johnson: The Promotion of Wellness**

Come to class with answers to the following questions based on Johnson and Johnson case

1. Why is J & J committed to improving employee wellness?
2. Assess the mix of J & J wellness programs and how J & J employees respond.
3. How cost effective are the J&J employee wellness programs?
4. What challenges did J&J still face in advancing its wellness goals?

Class 9: Equity and Ethics Barriers to Care at the Patient, Provider, and System Levels

Learning objectives

- Know empirical evidence to support use of strategies
- Know current use of strategies
- Assess the potential for achieving advantages and for satisfying the values and needs of a variety of stakeholders

Readings

- Williams, Joni Strom, Rebekah J. Walker, and Leonard E. Egede. "[Achieving equity in an evolving healthcare system: opportunities and challenges.](#)" *Am J Med Sci*, 351, no. 1, (2016):33–43.
- Armstrong, Katrina, Mary Putt, and Chanita Hughes Halbert. "[Prior experiences of racial discrimination and racial differences in health care system distrust.](#)" *Med Care*, 51, (2013):144–150.
- Caley and Marin. "Business Ethics Beyond Dilemmas" *Harvard Business Review*, (2019).
- Rosenblatt, Michael and Sachin H. Jain. "Conflict-of-Interest Rules Are Holding Back Medical Breakthroughs." *Harvard Business Review*, (2017).
- Bailey, Zinzi D., Justin M. Feldman, and Mary T. Bassett. "[How structural racism works—racist policies as a root cause of US racial health inequities.](#)" *New England Journal of Medicine* 384, no. 8 (2021): 768-773.
- **Case 7:** Smith, Craig N. and Erin McCormick. "Turing Pharmaceuticals: Fair Profit or Price Gouging in the Drug Industry." Harvard Business School, (May 2017).

Come to class with answers to the following questions based on Turing Pharma case

1. What is corporate social responsibility? How does it inform decisions about obligations to different company stakeholders?
2. Does Pharma have a responsibility to the public or should the focus primarily on returns to shareholders? What are the implications of the different answers for this question on patients and for the companies themselves?

Additional Reference Material

- Agency for Health Research and Quality (AHRQ). “[Disparities in Health Care Quality Among Racial and Ethnic Minority Groups: Selected Findings from the National Healthcare Quality and Disparities Reports.](#)” AHRQ, (April 2011).
- Nelson, Alan R., Adrienne Y. Stith, and Alan R. Nelson *Unequal Treatment: Confronting Racial and Ethnic Disparities in Health Care*. National Academy Press, (2003):1-28.
- Institute of Medicine. “[What Health Care Providers Need to Know About Racial and Ethnic Disparities in Healthcare Report Brief.](#)” National Academy Press, (March 2002).
- Institute of Medicine. “[What Health Care System Administrators Need to Know About Racial and Ethnic Disparities in Healthcare Report Brief.](#)” National Academy Press, (March 2002).
- Largent, Emily A. “[Public Health, Racism, and the Lasting Impact of Hospital Segregation.](#)” *Public Health Reports*, 133, no. 6, (Nov. 2018): 715–720, doi:10.1177/0033354918795891.

Class 10: Reimagining Healthcare Delivery

Learning objectives

- Know empirical evidence to support use of strategies
- Know current use of strategies
- Assess the potential for achieving advantages and for satisfying the values and needs of a variety of stakeholders
- Understand the strengths and weaknesses of financial and non-financial incentives and reward systems

Readings

- 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.
- Lewis, Valerie A., Thomas D’Aunno, Geneva F. Murray, Stephen M. Shortell, and Carrie H. Colla. “[The hidden roles that management partners play in accountable care organizations.](#)” *Health Affairs*, 37, no. 2, (February 2018):292-298
- 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 8: [New England Baptist Hospital: Getting Paid for Value](#)**

Come to class with answers to the following questions based on the New England Baptist case

TBD.

Class 11: Predicting Roadblocks

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

Readings

- **Marcotte, B.J. et al. “[U.S Health Care Reform Can’t Wait for Quality Measures to be Perfect](#)”. Harvard Business Review, October 2017**
- **James BC, Savitz LA. [How Intermountain trimmed health care costs through robust quality improvement efforts](#). Health Affairs. 2011; 30(6): 1185-1191.**
- **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.
- Optional: Organization Design. Leatt, Baker & Kimberly
- Optional: Kaplan, R.S. & Norton, D., “[Using the Balanced Scorecard as a Strategic Management System](#),” Harvard Business Review, 1996
- 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 9 for individual memo 3: The University of Virginia Health System: The Next Generation of Quality Care and Patient Safety (A)**

Class 12: 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
- 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

- Chapter 7: "Evaluation of Alternatives and Strategic Choice" [Strategic Management of Health Care Organizations](#), Eighth Edition (2018), Ginter, Duncan, and Swayne, John Wiley & Sons
- Jacobides, Michael G. "Strategy tools for a shifting landscape." *Harvard Business Review* 88, no. 1 (2010): 76-84.
- 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 10: [Flexibility at Genentech: Developing Versatile Domain Experts and Deploying Flexible Resources at One U.S. Medical Affairs Unit](#)

Come to class with answers to the following questions based on the Genentech case.

1. When the new MU is formed, what were the critical challenges facing Silva de Lima and his senior leadership team?
2. At that time, what considerations did they need to balance?
3. Consider the initiatives they implemented and decide what are benefits and downsides, and determine which initiative is likely to have the most impact.
4. What are the potential downsides to this flexible model?
5. In hindsight, what should the Spectrum team have done differently?

Class 13: Inclusive Leadership and Leading Organizational Change

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
- Appreciate how diversity, inclusion, and belonging requires organizational change

Readings

- Rinne, April. "A Futurist's Guide to Preparing Your Company for Constant Change." *Harvard Business Review* (2021)
- Listen to this McKinsey podcast: [The Mass Personalization of Change](#)
- Traphagan, John. "We're Thinking About Organizational Culture All Wrong." *Harvard Business Review* 6 (2017).
- Ajayi-Hackworth, Femina. The Buzz: Psychological Safety and Race Discussions. (2020, October 08). Retrieved from <http://www.theinclusionsolution.me/the-buzz-psychological-safety-and-race-discussions>
- **Bourke, J. and Titus, A. The Key to Inclusive Leadership March 2020 Retrieved from <https://hbr.org/2020/03/the-key-to-inclusive-leadership>**
- **Zheng, Wei, Ronit Kark, and Alyson Meister. "How women manage the gendered norms of leadership." *Harvard Business Review* 28 (2018).**
- Optional: Roberson, Q., King, E., & Hebl, M. (2020). Designing more effective practices for reducing workplace inequality. *Behavioral Science & Policy*, 6(1), 39-49.
- Optional: Shore, L. M., & Chung, B. G. (2021). Inclusive Leadership: How leaders sustain or discourage work group inclusion. *Group & Organization Management*, 1059601121999580.
- **Case 11: [Juhi Warriar: Driving the Diversity Agenda at Revital Pharma Inc.](#)**

Come to class with answers to the following questions based on the Revital case.

1. What are the major leadership challenges facing Warriar?
2. What is the role of TA in driving diversity in organizations?
3. What are the major barriers that organizations face in cultivating gender diversity, and how can organizations work towards addressing this (and other diversity issues) in the workplace?

Class 14: Team Presentations

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
- **Case 12 (For Team Project): TBA on March 31 in the HBR Case Packet**
NB – There are also specific questions to answer in your analysis. Case will be hidden until March 31.

Assignments

Assignment 1: Current Topic Presentation

Current Topic Format

Each week (from class 3-12), specific students [will sign up to present a newspaper/on-line article](#) that addresses an issue that is affecting healthcare delivery in the US, ideally the topic for that week or prior weeks. The sign up schedule will be posted on Brightspace under course information. The presentation will be given at the start of the class meeting. The presentation (no slides required) will consist of a summary of the article and three questions designed to stimulate class discussion about the issue. Presentation and discussion should not exceed 10 minutes.

A one-page written summary of the article and the three discussion questions will also be submitted on Brightspace as a written assignment by 7am on Wednesday.

The article selected should be objective news reporting, not an editorial or an objective analysis (no opinion pieces or blogs) and have been published within the last six months.

Assignment 2: 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?
 - What is the rationale and evidence to support these recommendations?
 - Is/Are there alternative(s) that were considered? Why is it/are they not feasible?
- 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 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 must 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 3

This assignment must demonstrate an understanding of structural issues facing health organizations, the relationship to organizational performance, and the leadership necessary to recommend and execute the desired changes.

Teams of students will select a Community Health Needs Assessment (CHNA) published by a tax-exempt hospital (as part of the CHNA community benefit requirement defined by the Internal Revenue Service) and critique that CHNA. The critique must be concise but comprehensive in describing the student’s analysis of the elements found in or found missing from the document and the implementation plan.

The critique must include the following points at a minimum:

1. Discuss how the CNHA fits with the mission of the organization.

2. Overall impression of the assessment of the document, the strengths and weaknesses of the strategies identified, and identification of the opportunities not selected for action.
3. Critique the stated hospital community benefit. Should hospitals be responsible for conducting community health needs assessments? Justify your position.
4. What is your judgment of how well healthcare organizations have implemented anchor mission strategies to date? Provide examples.
5. Critique the strategies suggested in the CHNA implementation plan. How do these compare?
6. Suggest new approach(es) that address any overlooked opportunities for community benefit and equity.
 - How do these approaches support corporate social justice for the organization?
 - How do these approaches address the social determinants of health or health inequity in the short and long term?
 - How might these approaches deliver competitive advantage over the medium and long term?
 - What are potential opportunities for partnerships, alliances, and vertical integration?
 - How should these opportunities be presented to the governing body for consideration?

Submission of a project report with a maximum length of 4 pages addressing points 1-4. Develop a 15 min presentation to the “governing body” during class (points 5-6).

Assignment 4 (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 also 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?

Assume that the in-class presentation is to a sub-committee of the organization’s governing board to win support for your recommended strategy(ies).

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

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](#). All Wagner students have already read and signed the [Wagner 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](#) 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](#) 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 assignments to schedule mutually acceptable alternatives.