



NYU

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

HPAM-GP 1833.001

Strategic Management for Healthcare Organizations
(formerly *Health Services Management*)
Spring 2024

Instructor Information

Carla Jackie Sampson, Ph.D., MBA, FACHE

Email: carla.sampson@nyu.edu

Office Address: Puck Building, 3077

Office Hours by appointment; find a mutually convenient time by visiting the Calendly link on Brightspace

Each student must visit during the first three weeks of the class to discuss their career plans

Course Information

- Class Meeting Times: Wednesdays, 4:55–6:35 pm
- Class Location: Bobst LL142

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, 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.

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. Apply analytic frameworks used to assess complex community, sector, and organizational situations

- from a general management point of view, using a comprehensive strategic framework.
2. Develop and/or identify alternative strategies for pursuing organizational mission and vision and for working with diverse communities of stakeholders to achieve shared goals.
 3. Assess the implications of strategic options, including the potential for achieving advantages and for effective implementation as well as for satisfying the values and needs of a variety of stakeholders (community, clients, etc.)
 4. Collaborate with colleagues in bringing multiple perspectives and diverse skills together to produce innovative solutions to complex situations.
 5. Develop implementation plans for executing strategies within an organization's culture and work processes.
 6. Communicate strategic decisions from a managerial and leadership perspective.
 7. Create strategic options for healthcare organizations to achieve their goals, in a variety of economic and population health circumstances, within realistic business plans and budgetary constraints.
 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 skill/competency
2. **Intermediate:** Student demonstrates greater depth of understanding of this skill/competency and can use this ability to analyze a problem.
3. **Advanced:** Student demonstrates expertise in this skill/competency and can use this ability to evaluate, judge, and synthesize information.

Learning Assessment Table

Program Competency	Corresponding Course Learning Objective	Corresponding Assignment	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	4,5,6,8	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	1,7	Memo, Case Study Discussion, Class Participation	1
The ability to align human resource capacity and practices and processes with strategic organizational goals	3,5	Memo, Case Study Discussion, Final Project	2
The ability to hold people accountable to standards of performance and assure	1,5	Memo, Case Study Discussion,	3

Program Competency	Corresponding Course Learning Objective	Corresponding Assignment	Level of Competency Expected to Achieve via the Assignment
organizational, professional and ethical compliance		Class Participation	
The ability to measure, monitor and improve safety, quality, access and system care delivery processes in healthcare organizations	5,8	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	1,3,7	Memo, Case Study Discussion, Final Project	2
The ability to communicate and interact productively in a diverse and changing industry, workforce, and citizenry	4,6	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	4,6	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 no single right answer in social science.** Then, we will develop the psychological safety to participate fully in various 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 lived experience and worldview 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 and throughout the term.

Materials

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 experiences relevant to the topics and cases we will explore.

The series of case studies and other required materials will be available on the Brightspace site for the course. Note that there are several readings for each week, and these will be marked as required (read, watch, or listen) or skim (check this out) material.

We will also read and reference several chapters from:

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).

Environmental, Social, Governance: A Framework for the Future of Healthcare (2023) by Sampson ed.; a free copy will be provided in class.

Course Requirements

There are five basic requirements for the course to optimize your preparation for the profession:

Assignment	Group/Individual	% Grade
321 Reflections	Individual	5%
Class participation	Individual	15%
Current topic presentation	Individual	5%
Case Analyses x 2	Individual	30%
	subtotal	55%
Project 1	Group	20%
Project 2	Group	25%

Class Participation (15%):

Active participation is critical in this course. Productive discussion depends on students critically 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 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 sessions and interact with the instructor and classmates	Student does not attend classes	Student attends some classes and does not interact with the instructor and classmates.	Student attends most classes but does not interact with the instructor and classmates.	Student attends at least 10 classes and demonstrates minimal interaction with the instructor and classmates by participating on occasion.	Student attends at least 12 classes and demonstrates moderate interaction with the instructor and classmates by participating frequently.	Student attends all sessions and demonstrates high quality interaction by frequently responding to the instructor and classmates with valuable, relevant contributions.

Assignments

3-2-1 Exercises (5%)

At the end of each class, you will submit short answers on Brightspace for each of the following questions:

- What are **three** things you are taking away from class today?
- What are **two** things you found interesting?
- What is **one** thing/concept you are still struggling with or what is **one** question that you still have?

The 3-2-1 exercises are graded on a submitted/not submitted basis and are due after each class **by Thursday noon.**

Current Topic Individual Presentation (5%)

One feature of strategic healthcare management today is keeping pace with constant change. As such, healthcare is always in the news. On selected weeks as listed in the course session calendar, each student will sign up to present a newspaper/on-line article that addresses a management issue that is affecting healthcare delivery in the US, ideally the topic corresponding to that week’s class. 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 (**please do not read the article to us**). At the end of your presentation, ask three open-ended discussion questions related to class materials to facilitate class discussion. Your question cannot have a simple yes/no answer; if it does, you will lose 50 % of the grade for the assignment. To help you develop a good question, Google “Blooms Taxonomy Verbs”. Do not use verbs from the Knowledge or Understanding domains. You must be prepared to lead the class discussion on your topic.

Presentation and discussion should be planned to not exceed 10 minutes.

- A. A one-page written summary of the article and the three discussion questions will also be submitted on Brightspace under assignments by 7am on the selected Wednesday.
- B. The article selected should be objective news reporting, not an editorial or an objective analysis (i.e., no opinion pieces or blogs)
- C. The article must have been published within the last six months.

Students will receive no more than 50% credit if points B and C are ignored, and zero credit if there is no (or late) submission to Brightspace.

Assignment 2: Case Analysis Memo (30%)

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 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. The submission will be in the form of a memo addressed to the executive director of the focal organization, not to exceed 2 single-spaced pages (not including your reference page).

Pretend that you have been hired as a consultant to a leader within the organization in the case and the memo is your final deliverable. The memo must identify the problem as you see it, recommend solutions, and provide support for your perspective. Your purpose in writing these memos is to provide information and make recommendations to people who must make decisions about key strategic issues. Pedagogically, this assignment provides you with the opportunity to develop your writing, analysis, and communication skills. It also gives you the ability to apply course principles and practices.

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” if your proposed solution fails. Show how the readings informed your understanding of the case and influenced your decision-making. Also find other research or evidence that substantiates your solution. Please do not attempt to address every issue in the case; focus on your analysis of the problem and propose a potentially viable solution appropriate for the context of the case.

Here is the outline you must use:

Executive Summary

- Open with a short one-paragraph summary
- What is the context, key issue(s), and your recommendation? (N.B. this should not be a case synopsis)

Background

- Why are we facing these issues?
- What other issues stem from the problem you identify? Identify root cause(s).
- Explain your diagnosis. Why is this group/department/organization facing these issues?

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?
- Why are your recommendations better than this reasonable alternative?

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?

References must be included on a separate, final page of the document in Chicago Author/Date format.

Please use a simple and direct style, putting your conclusion or recommendation in the first paragraph. Provide specific recommendations that are realistic and take the individuals, context, timing, and other variables in the case into account.

Format

Page and format requirements: 2 pages, single spaced including any graphics or tables. Use Times New Roman font with 1-inch margins (looks count) and a 12-point font size.

Mechanics

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

Grading:

There is no single right answer, but there are stronger and weaker memos.

- o 30 pts are allocated for the analysis of the problems/opportunities and root causes.
- o 30 points are allocated for your recommendations.
- o 16 points are allocated for demonstrating strong critical thinking skills.
- o 12 points are allocated for the quality of your writing.
- o 12 points are allocated for the organization of ideas and format.

Assignment 3: Team project 1 (20%)

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 two-three students will be given the Community Health Needs Assessment (CHNA) published by Northwell Health, a tax-exempt hospital (as part of the CHNA community benefit requirement defined by the Internal Revenue Service) and critique that CHNA and the related implementation plan. 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 assignment includes a paper and a short presentation.

The critique must include the following points at a minimum:

1. Discuss how the CNHA fits with the mission of the organization.
2. Overall assessment of the strengths and weaknesses of the strategies identified, and identify 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 the organizations have implemented anchor mission strategies to date? Provide examples.
5. Critique the strategies suggested in the CHNA implementation plan. How do these compare to the identified needs?
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 or health disparities in the short and long term?
 - How do these approaches link to ESG risks?
 - How might these approaches deliver competitive advantage over the medium and long term?
 - What are potential opportunities for partnerships, alliances, and vertical integration?

Part 1: Submission of a project report with a maximum length of 4 pages addressing points 1-4.

Part 2: Develop and deliver a 15 min presentation (including questions) that addresses (points 5-6).

For both parts of the assignment, assume the audience are the leaders in the organization. For the presentation, your main goal is to inform and persuade the audience to link the CHNA implementation plan to three ESG risks in the company risk portfolio.

Assignment 4 (Final Project): Team Project 2 Case Analysis (25%)

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.**

Because strategy is so often formulated in groups, members of the class will be divided into teams for this assignment. 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, **in the present day.**

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/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.

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 arrive (or log in when we meet on Zoom) to class on time. Any absence must be explained and justified beforehand; your participation grade may be lowered if you do not do so (Also see class participation rubric).

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 two days late will receive a grade of zero. Do not let this happen to you.

Students needing accommodation.

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

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.

ChatGPT and other generative tools have limits. It is critical that the written work required by the course is yours. You should not use ChatGPT or other generative AI tools for any purpose other than idea generation. When you use any of these tools, you must include a note describing how you used them with the assignment and include the original output as an appendix to your assignment.

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. In the first two weeks of class, please notify me of religious holidays that might coincide with assignments to schedule mutually acceptable alternatives.

Course Session Calendar

#	Class Date	Topic	Assignments
1	1/24/24	Course Overview and Introductions	Submit your updated resume and post-graduate career goals 321 Reflection
2	1/31/24	Building Blocks: Mission and Vision and Values	321 Reflection
3	2/07/24	Strategy Formation: Internal Organizational Assessment	321 Reflection
4	2/14/24	Developing Strategy: Assessing Your Environment and Portfolio Analysis	Current Topic A, B 321 Reflection
5	2/21/24	Models of Strategy Formation and Assessing Your Organization Guest Speaker: Lana Lim, Wagner MPA Associate Director, Strategy Planning & Business Development, NYU Langone Health	Current Topic C, D 321 Reflection Case 1 due
6	2/28/24	Growth, Retrenchment, and Collaborative Strategies	Current Topic E, F 321 Reflection
7	3/06/24	Key Considerations for the Future of Health Services Management: Anchor Mission Strategy and Community Benefit Guest Speaker: Chris Nolan, Wagner MPA, FACHE Director, Anchor Initiatives Community Health Improvement, BJC Healthcare	321 Reflection
8	3/13/24	Equity and Ethics Guest Speaker: Eboné Carrington, Wagner MPA Managing Director - Manatt Health Strategies Manatt, Phelps & Phillips, LLP	Current Topic G, H 321 Reflection
	3/20/24	Spring Break	
9	3/27/24	ACHE Congress on Healthcare Leadership. Class meets via Zoom Key Considerations for the Future of Health Services Management: Anchor Mission Strategy and Community Benefit. Team Project Presentations	Team Project 1 due Monday 3/25/24 11:59 pm 321 Reflection
10	4/03/24	Key Considerations for the Future of Health Services Management: Technology & Virtual Health & AI, Reimagining Healthcare Delivery	Current Topic I 321 Reflection
11	4/10/24	Key Considerations for the Future of Health Services Management: New Business Models Guest Speaker: David Pecknay, MBA Chief Analyst SP Global	Current Topic J, K 321 Reflection
12	4/17/24	Inclusive Leadership and Leading Organizational Change	Current Topic L 321 Reflection
13	4/24/24	Implementing the Strategic Plan	Case 2 due 321 Reflection
14	5/01/24	Implementing the Strategic Plan Team Project Presentations	Team Project 2 due Tues 4/30 11:59 pm

Course Schedule and Assignments

Course Schedule and Assignments	
Module 1	Assignments
1/24/24	Course Overview and Introductions
	Submit your updated resume and post-graduate career goals 321 Reflection
<p>This module sets the stage for the course this semester. Our introductions will explore how the content in the semester can be tailored where possible to your interests and career goals. We will also review the assignments during the term and a road map to the final requirement in the course</p>	
	<p>Module learning objectives</p> <ol style="list-style-type: none"> 1. Establish our learning community. 2. Define the nature and scope of the course, including the basic conceptual framework and approach. 3. Explore the basic course themes of strategy, strategic thinking, and strategic planning.
	Materials
Watch	<p>Herminia Ibarra – The Authenticity Paradox Jodi Ann Burey -- The myth of bringing your full, authentic self to work</p>
Read	<ul style="list-style-type: none"> • HBP. Michael E. Porter, “What Is Strategy?” Harvard Business Review: Nov/Dec 1996: 61-78. • HBP. Eric Van Den Steen, “Strategy and Strategic Thinking” Harvard Business Review Jan 2021
Skim	<ul style="list-style-type: none"> • Carlos Rey, Nuria Chinchilla, Nuno Pitta, “Objectives are SMART, missions are WISE” IESE Insight Review, Issue 33, second quarter, 2017.
	<p>Check out the parts of this multimedia case at random that you are curious about. Paul Levy: Taking Charge of the Beth Israel Deaconess Medical Center (Multimedia Case) V2. (These materials will be a touchstone for the entire semester). As you peruse these materials for BIDMC, consider following questions:</p> <ol style="list-style-type: none"> a) How would you describe the situation that Paul Levy inherited at the BIDMC? What challenges did he face? Why did previous turnaround efforts fail? b) How did Levy get started in his new job? In particular, what were his objectives and what did he accomplish: <ul style="list-style-type: none"> • Prior to his first day of work? • On his first day? • During his first week? c) What (if anything) was distinctive about the way Levy went about formulating, announcing, and implementing the recovery plan? How did he overcome resistance? d) Given what you learned about management and leadership and your own style so far, what (if anything) would you have done differently? Why?
Module 2	Assignments
1/31/24	Building Blocks: Mission and Vision and Values
	Submit 321 Reflection
<p>This module contains important information regarding the mission and vision that establish the foundation and clarify the remaining components of an organization’s strategic plan. By the end of this module, you will be able to describe the importance of strategic management in an organization. You will also identify the components and purpose of a mission and vision statement and tell how mission statement strategies can differ.</p>	
	<p>Module learning objectives</p> <ol style="list-style-type: none"> 1. Define the nature and scope of strategic planning, including the basic conceptual framework and approach. 2. Explain the basic course themes of strategic thinking, strategy, and strategic planning.

	<p>3. Develop mission and vision statements as the foundation of organizational strategy.</p> <p>4. Explain the differences between strategy and tactics in assessing organizational options in a difficult context.</p>
	Materials
Read	<ul style="list-style-type: none"> • HBP: Brandenburger, Adam. "Strategy Needs Creativity," <i>Harvard Business Review</i>, March-April 2019. • HBP: Chevereux, Laurent, Jose Lopez, and Xavier Mesnard. "The Best Companies Know How to Balance Strategy and Purpose." <i>Harvard Business Review</i>, November 2017. • HBP: Gavetti, Giovanni and Jan Rivkin. "How Strategists Really Think: Tapping the Power of Analogy." <i>Harvard Business Review</i>, April, 2005. • Hagel, John and John S. Brown. 2018. "<u>Zoom Out/Zoom In: An Alternative Approach to Strategy in a World that Defies Prediction.</u>" Deloitte Insights. • Kachaner, Nicolas, Kermit King, and Sam Stewart. 2016. "<u>Four Best Practices for Strategic Planning.</u>" The Boston Consulting Group. • Watts, Tracy. "2023: <u>The Year to Get Creative with Strategic Planning.</u>" Mercer. Last modified January 5, 2023.
Skim	<ul style="list-style-type: none"> • Chapter 5, "Directional strategies" <u>Strategic Management of Health Care Organizations</u>, Eighth Edition (2018), Ginter, Duncan, and Swayne, John Wiley & Sons • American Hospital Association (2009). <u>Guide to good governance for hospital boards.</u>
Case Prep	<ul style="list-style-type: none"> • Case Shriners Hospital for Children • What is the unique governance structure of SHC? • What is the SHC's current strategy? • What caused SHC to be in its current precarious financial position? • Who are the parties impacted by SHC's existing situation? What impact could these financial challenges have in the short and long term? • Evaluate the options being considered by SHC management. Are there any other actions they should explore? • How should SHC management position their recommendations to get approval from the 1,400 delegates?

Module 3	Assignments
2/07/24	<p>Strategy Formation: Internal Organizational Assessment</p> <p>321 Reflection</p>
<p>This module contains important information on the three main models of strategy formation, identifies risks to strategic planning which will need to be addressed to ensure success, and provides the foundation for utilizing tools (e.g., SWOT analysis) relevant to determining internal strengths and weaknesses. This content is important because the SWOT analysis is the first step in identifying areas of strength to grow and expand and areas of weaknesses to develop or divest. The SWOT analysis tool is the first step to creating informed strategies.</p>	
	<p>Module learning objectives</p> <ol style="list-style-type: none"> 1. Analyze planning assumptions, analyses, and strategic recommendations critically. 2. Support proposed actions with rigorous analysis and clear logic. 3. Develop a practical framework for assessing internal strengths and weaknesses in the context of organizational mission. 4. Conduct an internal organizational assessment.
	Materials

Module 3		Assignments
Read	<ul style="list-style-type: none"> • Teoli D, Sanvictores T, An J. SWOT Analysis. [Updated 2022 Sep 5]. In: StatPearls [Internet]. Treasure Island (FL): StatPearls Publishing; 2023 Jan. Available from: https://www.ncbi.nlm.nih.gov/books/NBK537302/ • Chapter 4, "Internal Analysis and Competitive Analysis" <u>Strategic Management of Health Care Organizations</u>, Eighth Edition (2018), Ginter, Duncan, and Swayne, John Wiley & Sons • HBP: Using the SWOT Framework in the Healthcare Sector 	
Case Prep	<ul style="list-style-type: none"> • Case <u>Wichita County Health Center: Strategic Planning</u> Come to class with answers to the following questions based on the Wichita County Health Center (WCHC) case as a starting point for our discussion. <ol style="list-style-type: none"> 1. What are WCHC's key strengths, opportunities, weaknesses, and threats (SWOT)? i.e., Draft a SWOT analysis as part of your class preparation. 2. Should WCHC align with Centura? 3. If yes, under what terms? If no, what opportunities should WCHC pursue independently? 	

Module 4		Assignments
2/14/24	Developing Strategy: Assessing Your Environment and Portfolio Analysis	Current Topic A, B 321 Reflection
<p>This module contains important information on the tools necessary to assess a competitive environment and an objective framework to analyze an organization's portfolio of programs and services. These tools provide a basis for planning assumptions when developing organizational strategies.</p>		
<p>Module learning objectives</p> <ol style="list-style-type: none"> 1. Analyze the core functions of competitors, customers, holders of resources, referees, and allies in a strategic context. 2. Develop a comprehensive diagnostic approach for conducting a complete strategic review of an organization in its external context, including skills in assessing the external environment of organizations. 3. Explain the importance of portfolio analysis. 4. Understand the core functions of 'competitors', 'customers', 'holder of resources', 'referee', and 'allies' in a strategic context. 		
Materials		
Read	<ul style="list-style-type: none"> • Chapter 2 "External Analysis" and Chapter 3 "Service Area Competitor Analysis" in <u>Strategic Management of Health Care Organizations</u>, Eighth Edition (2018), Ginter, Duncan, and Swayne, John Wiley & Sons • American Hospital Association <u>2024 Environmental Scan Executive Summary</u> • Kaissi, A. A., & Begun, J. W. (2008). <u>Fads, fashions, and bandwagons in health care strategy</u>. <i>Health Care Management Review</i>, 33 (2), 94102. 	
Skim	<ul style="list-style-type: none"> • American Hospital Association <u>2024 Environmental Scan (Report Body)</u> • Dealing With Hospital Closure, Pioneer Kansas Town Asks: <u>What Comes Next?</u>, KHN 	

Module 5	Assignments
2/21/24	Models of Strategy Formation and Assessing Your Organization Current Topic C& D Submit 321 Reflection Case Memo 1 due 2/19
<p>This module contains important information on the three main models of strategy formation, identifies risks to strategic planning which will need to be addressed to ensure success, and provides the foundation for utilizing tools (e.g., SWOT analysis) relevant to determining internal strengths and weaknesses. This content is important because the SWOT analysis is the first step in identifying areas of strength to grow and expand and areas of weaknesses to develop or divest. The SWOT analysis tool is the first step to creating informed strategies.</p>	
<p>Module learning objectives</p> <ol style="list-style-type: none"> 1. Analyze planning assumptions, analyses, and strategic recommendations critically. 2. Support proposed actions with rigorous analysis and clear logic. 3. Develop a practical framework for assessing internal strengths and weaknesses in the context of organizational mission. 4. Conduct an internal organizational assessment. 	
<p>Guest Lecturer Lana Lim, Wagner MPA Associate Director, Strategy Planning & Business Development, NYU Langone Health</p>	
Materials	
Read	<ul style="list-style-type: none"> • How To ‘Be More Strategic’—Questions to Ask from The Balcony, Forbes • HBP: Frank Vermeulen, “Five Strategy Questions Every Leader Should Make Time For” Harvard Business Review, September 3, 2015 • Weathering the Storm at NYU Langone Medical Center • Strategic Planning Should Be a Strategic Exercise
Skim	SWOT Analysis
Case Memo	When Competition Isn't Enough: Rural Health in Southwest Virginia (A)

Module 6		Assignments
2/28/2024	Growth, Retrenchment, and Collaborative Strategies	Current Topic E,F 321 Reflection
This module contains important information on developing strategies for growth, retrenchment, and collaboration. Building upon the analytical tools discussed in prior modules, this module focuses on using that information to create organizational strategies consistent with the defined objectives.		
Module learning objectives 1. Assess the potential and desirability of organizational growth in terms of its implications for organizational culture, clinical workforce and mission as well as assessing its effectiveness. 2. Explain the implications of alternative growth strategies in terms of resource and market viability. 3. Explain the essential need for clarity of vision and building consensus in developing strategic options and maintaining focus in times of retrenchment. 4. Defend alternative approaches to retrenchment, including strategies and tactics. 5. Create and balance multiple external and internal stakeholder interests in forming and managing strategic alliances.		
Materials		
Read	<ul style="list-style-type: none"> • US Health Systems Diversify to Thrive • What to Expect in US Healthcare 2023 and Beyond 	
Watch	<ul style="list-style-type: none"> • Should We Close That Program? Understanding Macmillan Matrix (14:58) 	
Case Prep	<ul style="list-style-type: none"> • Kanter, Rosabeth Moss, and Tuna Cem Hayirli. <i>CVS Health: Prescription for Transformation</i>. Boston: Harvard Business School Publishing, 2022. http://hbsp.harvard.edu. 	

Module 7		Assignments
3/6/2024	Key Considerations for the Future of Health Services Management: Anchor Mission Strategy and Community Benefit; Is Community Health Needs Assessment the S in ESG?	321 Reflection
Guest Speaker: Chris Nolan, Wagner MPA, FACHE Director, Anchor Initiatives Community Health Improvement, BJC Healthcare		
Module learning objectives 1. Understand the strengths and weaknesses of key strategies 2. Know empirical evidence to support use of strategies 3. Know current use of strategies		
Materials		
Listen	<ul style="list-style-type: none"> • Podcast: Trade Offs Episode 197 – <i>California Bets Big on Housing in Medicaid</i>. 	
Read	<ul style="list-style-type: none"> • Henisz, Witold, Tim Koller, and Robin Nuttall. “Five ways that ESG creates value.” McKinsey & Company, (November 2019). • Shulman, Haley and Bill Hemmer. “American Hospital Association Releases Its Most Recent Community Benefit Report Applicable To Tax-Exempt Hospitals.” Withum, (January 2021). • ‘Non-Charitable’ Nonprofit Hospital Ordered to Start Paying Property Taxes. Bloomberg Tax • Begun, James W. PhD; Potthoff, Sandra PhD. Moving Upstream in U.S. Hospital Care Toward Investments in Population Health. <i>Journal of Healthcare Management</i> 62(5):p 343-353, September/October 2017. DOI: 10.1097/JHM-D-16-00010 	

Module 7		Assignments
	<ul style="list-style-type: none"> Selected cases in ESG – A Framework for the Future of Healthcare <ul style="list-style-type: none"> Editorial Climate Change and Healthcare: A Complicated Relationship StonyBrook University Hospital: Working Cleaner, Smarter Equity Rx - Boston Medical Center - Community Health Improvement at BJC Aligning Healthcare’s Mission with Corporate Social Responsibility Action - Northwell 	
Skim	<ul style="list-style-type: none"> 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." <i>American journal of public health</i>, 110, no. 3 (2020): 309-316. 	

Module 8		Assignments
3/13/24	Equity and Ethics Barriers to Care at the Patient, Provider, and System Levels	Current Topic G,H 321 Reflection
	Guest Speaker: Eboné Carrington, Wagner MPA Managing Director - Manatt Health Strategies Manatt, Phelps & Phillips, LLP	
	Module learning objectives 1. Know empirical evidence to support use of strategies. 2. Know current use of strategies. 3. Assess the potential for achieving advantages and for satisfying the values and needs of a variety of stakeholders.	
	Materials	
Read	<ul style="list-style-type: none"> Williams, Joni Strom, Rebekah J. Walker, and Leonard E. Egede. “<u>Achieving equity in an evolving healthcare system: opportunities and challenges.</u>” <i>Am J Med Sci</i>, 351, no. 1, (2016):33–43. Armstrong, Katrina, Mary Putt, and Chanita Hughes Halbert. “<u>Prior experiences of racial discrimination and racial differences in health care system distrust.</u>” <i>Med Care</i>, 51, (2013):144–150. Caley and Marin. “Business Ethics Beyond Dilemmas” <i>Harvard Business Review</i>, (2019). Sick Profit: <u>Investigating Private Equity’s Stealthy Takeover of Health Care Across Cities and Specialties.</u> Bailey, Zinzi D., Justin M. Feldman, and Mary T. Bassett. "<u>How structural racism works—racist policies as a root cause of US racial health inequities.</u>" <i>New England Journal of Medicine</i> 384, no. 8 (2021): 768-773. Fashaw-Walters, Shekinah A., and Cydney M. McGuire. "<u>Proposing A Racism-Conscious Approach To Policy Making And Health Care Practices: Article proposes a racism-concious health policy framework.</u>" <i>Health Affairs</i> 42, no. 10 (2023): 1351-1358. 	
Skim	<ul style="list-style-type: none"> <u>NY 1115 Waiver Demonstration</u> 	
Case	<ul style="list-style-type: none"> <u>West Side United: Hospitals Tackle the Racial Health and Wealth Gap</u> 	
Ref:	Additional Reference Material <ul style="list-style-type: none"> Agency for Health Research and Quality (AHRQ). “<u>Disparities in Health Care Quality Among Racial and Ethnic Minority Groups: Selected Findings from the National Healthcare Quality and Disparities Reports.</u>” AHRQ, (April 2011). Nelson, Alan R., Adrienne Y. Stith, and Alan R. Nelson <i>Unequal Treatment: Confronting Racial and Ethnic Disparities in Health Care</i>. National Academy Press, (2003):1-28. Institute of Medicine. “<u>What Health Care Providers Need to Know About Racial and Ethnic Disparities in Healthcare Report Brief.</u>” National Academy Press, (March 2002). 	

<ul style="list-style-type: none"> • Institute of Medicine. “<u>What Health Care System Administrators Need to Know About Racial and Ethnic Disparities in Healthcare Report Brief.</u>” National Academy Press, (March 2002). • Largent, Emily A. “<u>Public Health, Racism, and the Lasting Impact of Hospital Segregation.</u>” <i>Public Health Reports</i>, 133, no. 6, (Nov. 2018): 715–720, doi:10.1177/0033354918795891.
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Module 9		Assignments
3/27/24	ACHE Congress on Healthcare Leadership. Class meets via Zoom Key Considerations for the Future of Health Services Management: Anchor Mission Strategy and Community Benefit. Team Project Presentations	Team Project 1 due Monday 3/25/24 11:59 pm 321 Reflection
Module learning objectives 1. Understand how successful organizational change rests on an effective diagnosis of an organization, drawing on key concepts from the course 2. Assess the challenges in translating broad concepts and grand visions into effective action ‘on the ground’, especially in the face of resistance 3. Develop a comprehensive diagnostic approach for conducting a complete strategic review of an organization in its full internal and external context		

Module 10		Assignments
4/03/24	Key Considerations for the Future of Health Services Management: Technology & Virtual Health & AI, Reimagining Healthcare Delivery	Current Topic I 321 Reflection
This module contains important information for healthcare leaders that examines the digital revolution of healthcare delivery		
Module learning objectives 1. Understand the relationship of incentive and reward systems to other key aspects of organizational design. 2. Know current approaches in digital healthcare and the drivers for change. 3. Know strengths and weaknesses of current designs, including outcomes.		
Materials		
Listen	<ul style="list-style-type: none"> • TradeOffs Podcast Healthcare’s Ransomware Wake Up Call • TradeOffs Podcast Rooting out Racial Bias in Health Care AI 	
Read	<ul style="list-style-type: none"> • Blumenthal, D. "Where telemedicine falls short." <i>Harvard Business Review</i> (2020). • Disruptive Trends in Healthcare: The Rise of Omnichannel Care is Forcing Healthcare Evolution • 2023 Global Healthcare Outlook: Deloitte pp 0-17 • Tapscott, Don, and Alex Tapscott. “What Blockchain Could Mean for Your Health Data” <i>Harvard Business Review</i> (2020) 	
Skim	<ul style="list-style-type: none"> • Chen, Shirley X. and Mitesh S. Patel “Digital Health Tools Offer New Opportunities for Personalized Care” <i>Harvard Business Review</i> (2020) • Marchalik, Daniel. “Put Doctors at the Center of Health Care Tech” <i>Harvard Business Review</i> (2020) 	
Case Prep	<ul style="list-style-type: none"> • Carolinas Healthcare System: Consumer Analytics Come to class with answers to the following questions based on the Carolinas Health System (CHS) case as a starting point for our discussion. 1. Why has CHS invested in DA? 	

	<ol style="list-style-type: none"> 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?
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Module 11		Assignments
4/10/24	Key Considerations for the Future of Health Services Management: New Business Models	Current Topic J, K 321 Reflection
	Module learning objectives 1. Understand the strengths and weaknesses of key strategies. 2. Know empirical evidence to support use of strategies. 3. Know current use of strategies.	
	Materials	
Read	<ul style="list-style-type: none"> • Dryda, L. How health systems are confronting the retail revolution in healthcare. <i>Becker’s Hospital Review</i> March 2020 • New business models in health care: Building platform-enabled ecosystems, Deloitte, 2022 • 2023 Global Healthcare Outlook, Deloitte. pp 0-17 • Sick Profit: Investigating Private Equity’s Stealthy Takeover of Health Care Across Cities and Specialties. • Disruptive Trends in Healthcare: The Rise of Omnichannel Care is Forcing Healthcare Evolution • American Hospital Association (AHA). 2021. Data Brief: Health Care Workforce Challenges Threaten Hospitals’ Ability to Care for Patients. Published October. www.aha.org/system/files/media/file/2021/11/data-brief-health-care-workforce-challenges-threaten-hospitals-ability-to-care-for-patients.pdf. • Kerns, Christopher and Dave Willis “The Problem with U.S. Health Care Isn’t a Shortage of Doctors” <i>Harvard Business Review</i> (2020) 	
Listen	<ul style="list-style-type: none"> • Tradeoffs – When Home Becomes a Hospital 	
Skim	<ul style="list-style-type: none"> • Chapter 6 “Identifying Strategic Alternatives” Strategic Management of Health Care Organizations, Eighth Edition (2018), Ginter, Duncan, and Swayne, John Wiley & Sons • Tsai & Jha, “Hospital Consolidation, Competition, and Quality Is Bigger Necessarily Better?” <i>JAMA</i>, July 2014 • 2022 Global Healthcare Outlook: Deloitte pp 3-4: 26-29 (see if they were on track last year) • Rees, Caroline and Robert Eccles “Quantify Your Company’s Impact on People’ <i>Harvard Business Review</i> (2020) • Nyweide, David J., Woolton Lee, and Carrie H. Colla. “Accountable Care Organizations’ Increase in Nonphysician Practitioners May Signal Shift For Health Care Workforce.” <i>Health Affairs</i>, 39, no. 6, (2020):1080–86. 	
Case Prep	Health City Cayman Islands Come to class with answers to the following questions based on the Health City Cayman Islands case as a starting point for our discussion. <ol style="list-style-type: none"> 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 upwards of \$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?
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Module 12		Assignments
4/17/24	Inclusive Leadership and Leading Organizational Change	Current Topic L 321 Reflection
This module contains important information for healthcare leaders that examines DEIB initiatives in a constantly changing healthcare landscape.		
	Module learning objectives <ul style="list-style-type: none"> • Know what organizational culture is and is not, including the major elements of culture • Examine how organizational culture can affect organizational performance • Understand how to change organizational culture • Appreciate how diversity, inclusion, and belonging requires organizational change • Determine sources of resistance to change and how to address them 	
	Materials	
Listen	<ul style="list-style-type: none"> • Listen to this McKinsey podcast: The Mass Personalization of Change 	
Read	<ul style="list-style-type: none"> • Rinne, April. "A Futurist's Guide to Preparing Your Company for Constant Change." <i>Harvard Business Review</i> (2021) • Traphagan, John. "We're Thinking About Organizational Culture All Wrong." <i>Harvard Business Review</i> 6 (2017). • Zheng, Wei, Ronit Kark, and Alyson Meister. "How women manage the gendered norms of leadership." <i>Harvard Business Review</i> 28 (2018). • Sampson, C.J. (2022). "Inclusive Leadership" Book Chapter in <i>Leadership in Healthcare: Essential Values and Skills</i> Fourth Edition Carson Dye ed. (Chicago: Health Administration Press) (class handout) 	
Skim	<ul style="list-style-type: none"> • Roberson, Q., King, E., & Hebl, M. (2020). <u>Designing more effective practices for reducing workplace inequality</u>. <i>Behavioral Science & Policy</i>, 6(1), 39-49. • Optional: Shore, L. M., & Chung, B. G. (2021). Inclusive Leadership: How leaders sustain or discourage work group inclusion. <i>Group & Organization Management</i>, 1059601121999580. 	
Case	<ul style="list-style-type: none"> • Inclusive Innovation at Mass General Brigham 	

Module 13		Assignments
4/24/24	Implementing the Strategic Plan	Case 2 Due 321 Reflection
This module contains important information on developing strategies for growth, retrenchment, and collaboration. Building upon the analytical tools discussed in prior modules, this module focuses on using that information to create organizational strategies consistent with the defined objectives.		
	Module learning objectives <ol style="list-style-type: none"> 1. Assess the potential and desirability of organizational growth in terms of its implications for organizational culture, clinical workforce and mission as well as assessing its effectiveness. 2. Explain the implications of alternative growth strategies in terms of resource and market viability. 3. Explain the essential need for clarity of vision and building consensus in developing strategic options and maintaining focus in times of retrenchment. 	

	4. Defend alternative approaches to retrenchment, including strategies and tactics. 5. Create and balance multiple external and internal stakeholder interests in forming and managing strategic alliances.
	Materials
Read	<ul style="list-style-type: none"> • East, Laurie M. "Developing a Pro Forma Financial Statement." Medical Group Management Association. 2019. • Kotter, J. P. 1995. Leading Change: Why Transformation Efforts Fail. Harvard Business Review Vol. 73 Issue 2, 59-68. (M&L reading) • Kaplan, R.S. "<u>The Balanced Scorecard for Public-Sector Organizations</u>," Balanced Scorecard Report • Organization Design. Leatt, Baker & Kimberly
Write	<p>Read:</p> <ul style="list-style-type: none"> • Case for Memo 2 : <u>New England Baptist Hospital: Getting Paid for Value</u> <p>Resources</p> <ul style="list-style-type: none"> • Damberg, Sorbero, Lovejoy, Martsolf, Raaen & Mandel <u>Measuring Success in Health Care Value-Based Purchasing Programs: Findings from an Environmental Scan, Literature Review, and Expert Panel Discussions</u>. RAND, 2014 (p.1-35). • Marcotte, B.J. et al. "<u>U.S Health Care Reform Can't Wait for Quality Measures to be Perfect</u>". Harvard Business Review, October 2017 • Kaplan, R.S., Jehi, L., Ko, C.Y., Pusic, A. and Witkowski, M., 2021. Health care measurements that improve patient outcomes. <i>NEJM Catalyst Innovations in Care Delivery</i>, 2(2).
Case	<u>Commonwealth Care Alliance: Elderly and Disabled Care</u>

Module 14		Assignments
5/01/24	Implementing the Strategic Plan	321 Reflection Team Project 2 due Tues 4/30 11:59 pm
	The course final, Student teams will present their final projects.	
	<p>Module learning objectives</p> <ol style="list-style-type: none"> 1. Assess the potential for achieving advantages and for satisfying the values and needs of a variety of stakeholders. 2. Understand the strengths and weaknesses of financial and non-financial incentives and reward systems. 3. Use the MacMillan Matrix to decide what strategies to use (and not use) for your organization's divisions (portfolio analysis). 4. Develop a comprehensive diagnostic approach for conducting a complete strategic review of an organization in its full internal and external context. 5. Use the balanced scorecard as a performance management tool for monitoring the effective implementation of vision and strategy. 	
	Materials	
Read	<ul style="list-style-type: none"> • Chapter 7: "Evaluation of Alternatives and Strategic Choice" <u>Strategic Management of Health Care Organizations</u>, Eighth Edition (2018), Ginter, Duncan, and Swayne, John Wiley & Sons • Jacobides, Michael G. "Strategy tools for a shifting landscape." <i>Harvard Business Review</i> 88, no. 1 (2010): 76-84. • Kale, P. & Singh, H. "<u>Managing Strategic Alliances: What Do We Know, and Where Do We Go from Here?</u>" Academy of Management Perspectives, 2009. (Critique this reading) 	
Skim	<ul style="list-style-type: none"> • Driving Growth through Consumer Centricity in Healthcare McKinsey 2023 	
Or listen	An audio version of the McKinsey report above is available here	