Instructor: Nick Macchione, M.S., M.P.H., F.A.C.H.E.
John J. Hanlon Executive Scholar and Faculty Instructor, SDSU GSPH, HMP
Director, County of San Diego Health & Human Services Agency

Biography: http://www.sdcounty.ca.gov/hhsa/programs/sd/hhsa_directors_office/about_the_director.html

Day/Time/Location: Thursdays from 7:00 - 9:40 PM in Hepner Hall, room #122

Office Location: HT04 - Office hours are by Appointment.

Email Address: Nick.Macchione@mail.sdsu.edu

Course Description: This course is designed to provide second year graduate students with an advanced introduction to strategic planning and management in the health care industry. Students will learn how to complete a strategic plan for a health services organization. Specifically, through case studies, readings, lectures and assignments, students will learn about the role of the health care leaders and managers in analyzing strategic plans. Students will learn how organizations proactively create and sustain competitive advantage in the marketplace. Strategic planning processes in health services organizations will be examined in various settings, such as, multi-hospital systems, community health centers/clinics, governmental health institutions, physician group practices, managed care organizations, and biotech companies. In addition to the different types of for-profit, nonprofit and governmental health care organizations, this course will also draw on executives’ and managers’ perspectives about the rapidly changing environment of health care, and about the strategies and structures they are employing to respond to national health reform within highly competitive markets.

Course Learning: The Division of Health Management and Policy is accredited by the Commission on Accreditation Healthcare Management Education (CAHME). Please refer to the GSPH website for more details and a full listing of the division’s full listing of CAHME program competencies.
Learning objectives linked to CAHME competencies for this course is as follow:

A. **Gain knowledge of Health Care Policy and the Environment**  
   *(Competencies A5 an A7)*

   **A5. Describe the roles that legislators, providers, interest groups, consumers, professional and accrediting agencies, and other stakeholders in the community have in shaping and influencing policy.**
   
   - Identify key stakeholders by conducting a stakeholder analysis of the general and industry external environments for health care organizations (HCOs).
   - Evaluate the direct and indirect relationships between key stakeholders and the role of political power amongst them in influencing market position of a HCO.

   **A7. Compare and contrast characteristics of different health care delivery models and evaluate their effectiveness in the current health environment.**
   
   - Identify major general and industry environmental trends affecting HCOs and their respective service delivery systems (organizational design, governance and culture).
   - Conduct SWOT and TOWS analyses, product life cycles analysis and Boston Consulting Group portfolio analysis to identify strategically relevant strengths and weaknesses of different organizational designs and their effectiveness in achieving competitive advantage of HCOs in their target markets.

B. **Analysis and Critical Thinking**  
   *(Competencies B3, B5, B7-B8, & B10)*

   **B3. Apply a systems thinking approach to identify problems and evaluate alternate solutions for improving organizational performance.**
   
   - Differentiate between the appropriate use of strategic management, strategic planning and managing strategic momentum through the use of strategic thinking maps designed for the health care industry.
   - Understand the central elements of a complete strategic management process by conceptualizing, developing and managing strategies.

   **B5. Conduct service area competitive market analysis to determine the strategic direction of different health care organizations.**
   
   - Complete the entire process of a service area competitor analysis in understanding the market and identifying and evaluating competitors.
   - Understand obstacles (and their mitigations) to effective service area competitor analysis.
B7. Apply managerial and cost accounting information to evaluate financial performance and decision making in health care organizations.

- Analyze financial health of HCOs by reviewing detailed financial statements, annual reports and information provided by the Securities and Exchange Commission and rating agencies.
- Compute financial ratios, net income, and other financial formulas in case studies as it relates to the financial position of a HCO.

B8. Understand and calculate different reimbursement formulas and strategies for cost containment and revenue enhancement used by the government and health services organizations.

- Identify distinctive features of major public reimbursement programs’ (Medicare, Medicaid, Tricare, Veteran Administration, and SCHIP) impact on operational and financial strategies.
- Describe how payment methods for services provided to Medicare and Medicaid beneficiaries create different strategic opportunities and challenges for HCOs in which these services are delivered.
- Identify alternative strategies used by HCOs to increase revenue and reduce costs, and describe the challenges and limitations of both financial strategies.

B10. Understand and articulate economic models, concepts, and tools necessary to engage in effective policy analysis, formulation, evaluation, and advocacy.

- Define key sources of data for strategic planning and its use by health care executives and managers.
- Define Return on Investment measures used to analyze HCOs and assess performance of key decision makers.
- Discuss key strategic management characteristics between board of directors and executives, and indicate how they operate in making policy decisions in strategic decisions.
- Describe the characteristics of different target markets in which HCOs compete, and how these market characteristics affect their operating policies and procedures.
C. Management  
(Competencies C1, C3-C5 and C9-C10)

C1. Understand how health care organizations are structured, and how their different components (such as, human resources, governance, information systems, and patient care) interact and influence performance.

- Understand how to conduct a value chain analysis and apply its results into a strategic plan.
- Understand how the pre-service, point-of-service, and after-service strategies of a HCO influence organizational performance.
- Understand the decision logic for developing implementation strategies.

C3. Use strategic and business planning principles to develop and align the mission, vision, goals and objectives for operating a health care organization.

- Conduct and/or analyze a statement of strategic intent (from values to vision to mission to guiding principles to goals to objectives to results to evaluation) and its relevance to strategic alignment and competitive advantage.
- Understand how a sequential, step-by-step process for creating a strategy is conducted.

C4. Assess an organization’s external environment and apply principles of marketing to gain and maintain competitive advantage.

- Understand the specific goals and limitations of external environmental analysis.
- Conduct an analysis of the general and health care industry external environments for a HCO.
- Understand how external environmental scans are used in service area competitor analysis to determine strategically relevant strategies to achieve competitive advantage.
- Discuss how strategic marketing’s four Ps (product, place, price and promotion) are used to understand the needs of current and future customers in primary, secondary and tertiary target markets.
C5. Identify critical legal and ethical issues related to the delivery of health services, and understand their application to organizational decision making.

- Understand how the structure, function and strategic resources of a HCO are explicitly linked to its legal and regulatory requirements and how they influence a HCO’s strategic plan.
- Discuss ethical-decision making role of governance (boards of directors, executives and management) in the development and implementation of specific actions to address organizational weaknesses and market threats.

C9. Discuss managerial roles in planning, adopting, implementing, and evaluating interventions designed to improve the performance of health care organizations.

- Identify how the value chain analysis is used by healthcare managers to identify the most efficient use of internal resources in order to achieve the highest level of organizational performance.
- Identify how technology modernization influences strategic decision making in improving service delivery.
- Discuss, evaluate and select appropriate adaptive strategic alternatives for a HCO in achieving competitive advantage.

C10. Demonstrate awareness of how different cultural beliefs, practices, and needs presented by patients and their communities influence health care management and service delivery.

- Discuss how private payors and public assistance programs influence a HCO’s payer and patient mix, organizational management decisions, and patient health outcomes.
- Identify key market trends and determinants of the demand for health products and services by different customers/target populations, and explain how this affects the ability to manage health organizations.

D. Professional Skills and Leadership
(Competencies D1-D6)

D1. Identify and use appropriate oral and written communication strategies for different audiences, such as, line staff, executives, board members, policy makers, the general public, and other key stakeholders.

- Develop and deliver orally a presentation focusing on strategic issues related to case studies.
- Address key management issues in health care organizations by writing a case analysis and comprehensive strategic plan addressing selected issues.
D2. Demonstrate leadership skills and understand how leaders can ethically motivate and influence individuals, groups, and organizations.

- Discuss how executives and managers lead strategic planning efforts across different strategic business units (departments, divisions, organization, multi-system, matrix, etc).
- Discuss the use of motivational incentives in implementing action plans in the workplace and market.

D3. Understand the role of advocacy and how it influences community health and the development of health policies.

- Conduct political stakeholders analysis, including risk assessment for all key stakeholders
- Understand how political power in the form of advocacy influences strategic decisions made by HCO boards of directors and executives.
- Discuss role of elected officials and their impact on health in all policies.

D4. Understand the importance of networking and professional development through engagement with professional associations, such as, ACHE, MGMA, HFMA, APHA, and AUPHA.

- Discuss importance of networking and lifelong learning as a health care manager and executive through related professional associations.
- Discuss use of social media through professional associations as means of knowledge to assist with alliance building and gaining insight into emerging industry trends.
- Promote local chapter networking events and educational programs focused on strategic management.

D5. Form and lead teams to improve organizational, project, and task performance.

- Work in small groups of teams to analyze case studies.
- Conduct project action plan with team assignments in completing the final strategic plan.
- Evaluate project milestones and team performance

D6. Apply professional standards of business and medical ethics in the analysis of health care problems and issues.

- Discuss ethical-decision making role of governance (boards of directors, executives and management) in the development and implementation of specific actions to address organizational weaknesses and market threats.
- Discuss how ACHE’s and other professional associations’ Codes of Ethics are actively used by today’s health care executives in managing their organizations to achieve competitive advantage.
Prerequisites: This is upper level graduate course developed for 2nd year Health Management and Policy graduate students, as well as, 2nd year graduate students in the following programs: MSN (Leadership program), MPH/MSW (HMP track) and MBA (health concentration). This is a highly advanced course that requires students to have successfully completed at least PH641, PH644A and PH644B from the core HPM curriculum. To succeed in this course it is essential that the following five (5) areas have been achieved: 1) basic business communication and project management (clear, concise written memos and business documents; interpersonal communication through in-class presentations and teamwork, and group projects); 2) knowledge of role/function of key stakeholders in the U.S. health care system; 3) health care finance and the different reimbursement mechanisms; and 4) health care organizational behavior, including structure and governance; and 5) avid reader of current events in the health and human services market through peer-review journal articles and credible national news sources (i.e. HealthLine, ACHE, WSJ, New York Times, LA Times, etc.).

Course Requirements: The following textbook is required for this course:


Also, students must have an E-mail Address and will need to provide their email address to the instructor during the first day of class. Updated schedules and additional reading assignments will be distributed during the course via the course website on the University’s Blackboard. From the Blackboard home page – select course title (Spring 2012 semester). Students are expected to check the Blackboard weekly prior to and after each class for any announcements.

Additional Resources: The following learning materials will be employed in this course:


COURSE REQUIREMENTS AND GRADING POLICY

Grading Policy: The final grade for this course will be determined based on performance on the following graded assignments and class activities.

<table>
<thead>
<tr>
<th>Assignment or Activity</th>
<th>Weight</th>
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<tr>
<td>Practice Case Report: Cooper Green Hospital &amp; Community Health Plan (pp 692-716)</td>
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<td>Individual Case Report #1: C.W. Williams Health Center (pp 742-762)</td>
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<td>Individual Case Report #2: Midwestern Medical Group (pp 511-538)</td>
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<tr>
<td>Team Case Report: Tufts-New England Medical Center (pp 539-568)</td>
<td>20%</td>
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<td>Final Strategic Plan: Emanuel Medical Center (pp 670-691)</td>
<td>40%</td>
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<tr>
<td>In-Class Team Presentation</td>
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<tr>
<td>Attendance and Class Participation</td>
<td>10%</td>
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<td><strong>TOTAL</strong></td>
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</tbody>
</table>

A: 93-100%  B+: 87 – 89.9%  B: 80 – 82.9%  C+: 77 – 79.9%  C: 73 – 76.9%  D: 60 – 69.9%
A-: 90 – 92.9%  B: 83 – 86.9%  C+: 77 – 79.9%  C: 70 – 72.9%  F: < 60%

Case Reports: There will be a total of five full case studies issued throughout the course (an initial practice case study followed by four graded case reports). In preparing a written case report, it is important to focus on applying the readings and concepts presented in class. Case reports that simply discuss the case issues without applying the readings do not receive high grades. The case reports will be limited to the questions posed by the Instructor.

Practice Case and Individual Case Reports 1-2 shall be developed and submitted by each student and **limited to no more than three (3) typed pages in length**. Worksheets for all managerial analyses are to be included as exhibits which do not count towards the maximum page limit. **Case Reports 1 and 2 that exceed the three (3) page maximum limit will not be graded and receive zero (0) points.**

Team Case Report #1 shall be developed and submitted by each assigned team and **limited to no more than ten (10) typed pages in length**. Worksheets for all managerial analyses are to be included as exhibits which do not count towards the maximum page limit. **Case Reports that exceed the ten (10) page maximum limit will not be graded and receive zero (0) points for each team member.**

For maximum credit in each of the submitted case reports, the instructor anticipates a professional-level report that is submitted timely and well written (clear, concise with no grammatical errors, and thoroughly responsive to all questions).
**Final Strategic Plan:** Students are assigned the *Emanuel Medical Center (EMC)* case as their subject for the final strategic plan and presentation. Students will be assigned to teams who will work throughout the course in preparing a comprehensive strategic plan analysis. Diagrams and outlines of a comprehensive strategic management plan will be referred to in class. Please refer to these often. Many different managerial techniques and tools will be reviewed throughout this course and utilization of new material is expected as it is covered during the semester.

It will include one-inch margins all around, double spaced, and with a range of twenty (20) to thirty (30) typed pages. The cover page, citations and all appendices will not be counted as part of the page limit. The team case reports (hard copy with an electronic copy saved on diskette) are **due in class on May 2nd**. Late reports will be penalized with a full letter grade reduction from final grade.

All Team Case reports shall be printed on standard white paper and include one-inch margins all around, double-spaced with a cover page, table of contents, executive summary, and endnotes, if needed. Both the cover page, table of contents and endnotes do not count towards the maximum page-limit. Case reports are due in hard copy. Also, case reports must be submitted as an electronic copy to the Instructor’s email address ([Nick.Macchione@sdsu.edu](mailto:Nick.Macchione@sdsu.edu)) or saved on diskette and submitted with the hard copy. Failure to provide both a hard copy AND an electronic copy on the date due will be considered late.

Hard copies of the papers shall be handed in at the start of class, on the date the case is to be discussed. Late assignments (case reports, strategic plan and any other assignments issued by the Instructor) will be penalized with a full letter grade reduction from final grade. Also, discussion of the cases in informal groups, when papers are not being prepared, is encouraged. Preparation of the case reports should involve only individual effort unless otherwise noted by the Instructor. Note: You must also upload electronic copies of your papers to SafeAssign (these will be screened with a plagiarism check) on BlackBoard. You will receive separate paper instructions in advance.

**The Case Method:** As you will soon see from the case studies, in many instances there are no “right” answers to management problems. Rather, what cases do is bring a small chunk of the real world into the academic setting, where we can examine it, determine what problems exist, discuss optional approaches to dealing with the problems, and decide upon a course of action. In this respect, the study of management via cases is similar to the study of public health. That is, it is difficult to learn medical care and public health without examining specific cases; reading about a disease is no substitute for managing care of a patient. The same is true for organizational management.
Those of you who have participated in courses using the case method know that it is an extremely exciting way of learning. In particular, it gives recognition not only to your experience as health care professionals, but also to the fact that the real world is a complicated place where “cookbook” solutions simply won’t work. As such it puts participants in the middle of action, forcing them to be analytical and utilize management concepts rather than just reiterate them. However, the case method does not work, and furthermore, can be quite boring unless:

- Participants thoroughly prepare the case and reading material in advance of the class; and
- Participants actively participate in the discussion of the case.

To assist students in preparing for all graded case reports, read Appendix A in the Ginter textbook. Detailed instructions and “tips” on how to analyze and present a case report are discussed. In addition, there will be a practice case, the Cooper Green Hospital & Community Health Plan, conducted in class. The practice case will also provide an opportunity to review how case study analyses are to be presented in this course. Students will not be graded on the practice case studies.

Lastly, to assist students in preparing for all graded case reports, the Ginter textbook has a section on Analyzing Strategic Healthcare Cases and Financial Analysis for Health Care Organizations. It is located in Appendices A and B. Detailed instructions and “tips” on how to plan, organize and present your strategic plan presentation are discussed.

Also, to assist the teams with their final project, there will be one Strategic Planning Development Briefing held on March 21st. This briefing will offer the student teams an opportunity to meet and discuss the progress of their strategic plan in preparation for the final team presentations on May 2nd and May 9th. The briefings can be either formal or informal….team choice.

**Team Presentations:** The last two class sessions will be devoted to in-class small team presentations on their final strategic plan proposal. You will receive separate instructions for completing this assignment in advance.

It is anticipated that each team will have approximately 4-6 students. The instructor will assign the teams. Teams will work together throughout the entire course semester. In addition to individual case reports submitted by each student, teams will be assigned specific questions and challenges involving all of the cases. The final team case report presentation will be allowed a maximum of 45 minutes in length followed by 15 minutes of questions and answers regarding the team’s assumptions and recommendations involving the case. Specifically, the team’s recommendations will be questioned as to whether they are rational, relevant and practical. Identification of new and innovative solutions to the team’s assigned questions involving the case should also be discussed.
The instructor will grade each team’s presentation based on evaluation criteria that will be provided to the teams in advance of their presentations. In addition, each team member will have the opportunity to conduct a written, self-evaluation, as well as, comment on the performance of his or her team members.

In addition, an integrated set of handouts (typically no more than 2-4 pages, including an introduction to the key organizational issue assigned to each team) should be distributed to all class members. Please structure your handouts so classmates can follow without confusion or overload. Visuals, either overheads, PowerPoint slides, or poster board, are also expected.

Class Participation: Active class participation is expected in this class. Students will need to be prepared to apply the concepts and techniques covered in class and in the readings to the assigned questions and case studies, to your personal experiences in health care, and to health care organizations with which you are familiar. The quality as well as the quantity of the student’s input will be recognized. However, the most important comments are those that take the discussion to another level that deepen the class’ understanding of the complex management situation being studied.

COURSE POLICIES

Additional Course Information

1. All communication with students will be via email using Blackboard. Please be sure that your email address in Blackboard is up-to-date and that you check frequently for new messages.

2. Please be sure to turn OFF your iPhone, Blackberry, or other electronic device **before** class begins by **shutting it down** OR **silent mode only** and put it away from your desk area, preferably in your backpack, pocket, purse, under your desk seat, etc. You may access your electronic device during the scheduled class break but will need to turn it back OFF when class resumes.

3. If you would like to email the professor, including arranging an appointment, please put the following in the subject line: **STUDENT IN PH748**.

4. **No laptops, tablets or other electronic devices** are to be used or visible during class, except when working in your teams on projects or approved by the instructor.

5. PowerPoint slides or other material to be discussed in each class will generally be posted on Blackboard the day before class. You may choose to view and/or print it before class. The PowerPoint slides posted on Blackboard may be a summary of those presented in class. If so, the material presented in class will not be posted later on Blackboard.
6. Every effort will be made to follow the syllabus content and schedule. However, if circumstances dictate, there may be modifications necessary during the semester. If such is the case, the instructor will make every effort to notify students in a timely manner. It is the responsibility of students to check Blackboard for announcements and to inquire about handouts if absent from class.

7. If a class must be cancelled without prior notification, an announcement will be posted on Blackboard no later than noon on the day of class, if possible. Students should check the Blackboard course site for last-minute announcements and postings of material.

8. Please do not ask for any exam to be offered at a time other than that indicated in the course syllabus. These will not be given early or late to accommodate students’ travel plans or for any other contingency.

9. Although questions are always encouraged at any time during or after class, please do not ask to go back to a previous PowerPoint slide (except during a class break) as this will disrupt the presentation of information.

**UNIVERSITY POLICIES**

**Academic Misconduct**

Misconduct by a student shall include, but not be limited to: disrupting classes; giving or receiving unauthorized aid on examinations, reports or other assignments; knowingly misrepresenting the source of any academic work; falsifying research results; plagiarizing another’s work; violating regulations or ethical codes for the treatment of human subjects; or otherwise acting dishonestly. If an instance of academic misconduct is suspected, the student will be informed of the infraction and the penalty to be imposed. If appropriate, the matter will be referred to the Department Chair and Dean of the College for mediation.

It is vitally important that healthcare managers and administrators adhere to the highest code of conduct and personal standard of ethical behavior. This same expectation extends to all graded assignments for this course. With the exception of the team projects, all assignments must be the student’s original work. Violations of this policy may include a warning, an admonition, censure, reduction of grade (including an F for the course), disciplinary probation, suspension, or even expulsion.

**Statement on Nondiscrimination Policy**

San Diego State University complies with the requirements of Title VI and Title VII of the Civil Rights Act of 1964, as well as other applicable federal and state laws prohibiting discrimination. No person shall, on the basis of race, color, or national origin be excluded from participation in, be denied the benefits of, or be otherwise subjected to discrimination in any program of the California State University.
SDSU does not discriminate on the basis of disability in admission or access to, or treatment or employment in, its programs and activities. Students should direct inquiries concerning San Diego State University’s compliance with all relevant disability laws to the Director of Student Disability Services (SDS), Calpulli Center, Room 3101, San Diego State University, San Diego, CA 92128 or call 619-594-6473 (TDD: 619-594-2929).

SDSU does not discriminate on the basis of sex, gender, or sexual orientation in the educational programs or activities it conducts. More detail on SDSU’s Nondiscrimination Policy can be found in the SDSU General Catalog, University Policies.

**Student Conduct and Grievances**
SDSU is committed to maintaining a safe and healthy living and learning environment for students, faculty and staff. Sections 41301, Standards for Student Conduct, and Sections 41302-41304 of the University Policies regarding student conduct should be reviewed.

If a student believes that a professor’s treatment is grossly unfair or that a professor’s behavior is clearly unprofessional, the student may bring the complaint to the proper university authorities and official reviewing bodies. See University policies on Student Grievances.

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**Statement on Plagiarism and Academic Dishonesty**
Academic dishonesty includes cheating, plagiarism or other forms of academic dishonesty that are intended to gain unfair academic advantage. See section 41301 of the University policies. Plagiarism is an important element of this policy. Plagiarism is defined as ‘formal work publicly misrepresented as original; it is any activity wherein one person knowingly, directly and for lucre, status, recognition, or any public gain resorts to the published or unpublished work of another in order to represent it as one’s own’. Any work, in whole or in part, taken from the Internet or other computer-based source without referencing the source is considered plagiarism.

**Religious Holidays**
The University Policy File includes requirements governing absence for religious observances. By the end of the second week of classes, students should notify the instructor of planned absences for religious observances.

**Americans with Disabilities Act (ADA) Accommodation**
The University is committed to providing reasonable academic accommodation to students with disabilities. The Office of Services for Students with Disabilities provides university academic support services and specialized assistance to students with disabilities. Individuals with physical, perceptual, or learning disabilities as addressed by the Americans with Disabilities Act should contact Services for Students with Disabilities for information regarding accommodations. Please notify your instructor in advance so that reasonable efforts can be made to accommodate you. If you expect accommodation through the Act, you must make a formal request through Services for Students with Disabilities.
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<th>CAHME PROGRAM COMPETENCIES</th>
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<td>- Overview of course/syllabus review</td>
<td>A5, B3</td>
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<td>- Chap 3</td>
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<td>- Chap 3</td>
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<td>2/28</td>
<td>- Internal Environmental Analysis II</td>
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<td>- Group Dynamics and Thinking Strategically</td>
<td>- C.W. Williams Health Center Case</td>
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<td>through Effective Teamwork</td>
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<td>- Data Collection and Analysis Tips</td>
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<td>3/14</td>
<td>- Developing Strategic Alternatives II</td>
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<td>3/21</td>
<td>- Strategic Planning Development Briefing</td>
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<td>- Midwestern Medical Group Case</td>
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<td>NO CLASS – Spring Recess</td>
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<td>- Strategic Marketing in Health Care</td>
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<td>- Branding and Social Marketing</td>
<td>- Guest Lecturer: Moshe Engelberg, PhD, MPH</td>
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<td>4/18</td>
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<td>- Chap 10</td>
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<td>- Future of Strategic Management in US:</td>
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