



HPM 730.001 Fall 2018
Leadership and Management in Healthcare Organizations
Syllabus

Three Credit Hours
Department of Health Policy and Management
Gillings School of Global Public Health

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Course Overview and Format

This course provides an introduction and overview to leadership, management, and organizational behavior in health care, reflecting the uniqueness of this sector. The course integrates theory with practice through readings, lectures, written assignments, and guest presentations from different organizational perspectives. Assessment, practice and development of leadership, managerial and organizational skills will be accomplished through team exercises and small group work. Please complete the course Qualtrics biosketch so the instructor and TA can get to know you better.

https://unc.az1.qualtrics.com/jfe/form/SV_200ZBpiFuUu21wx

Learning Objectives

Course Learning Objectives		HPM Competencies
1.	Demonstrate basic familiarity with key organizational behavior theories and concepts related to leadership and management.	Organizational Awareness; Professionalism; Systems Thinking
2.	Understand and explain the uniqueness of structures, processes, and interactions in healthcare organizations as they relate to leadership, management and policy.	Analytical Thinking; Process Management and Organizational Design
3.	Understand and explain the different roles and specific challenges for leadership and management in health care.	Analytical Thinking; Organizational Awareness
4.	Demonstrate management skills critical to professional success in health care, including communication, conflict management, and emotional intelligence.	Interpersonal Awareness and Emotional Intelligence; Professionalism; Communication Skills

5.	Understand the factors needed for effective team performance; practice and demonstrate teamwork skills.	Professionalism; Communication Skills
6.	Demonstrate the ability to discuss complex leadership, management, and organizational issues in health care.	Analytical Thinking; Systems Thinking; Communication Skills

Texts and Resources

Required:

Robbins SP, & Judge TA. *Essentials of Organizational Behavior*, 14th edition. New York: Pearson, 2018. I recommend this newest edition, although the 13th edition is a close, though not perfect approximation.

We will be using five Harvard Business School Press (HBSP) cases. Because of copyright requirements, these must be purchased from HBSP. I have ordered this as a coursepack. To purchase the five cases, go to:

<https://hbsp.harvard.edu/import/560761>

This is a simple process, but you will first be asked to register with HBSP, then make your purchase. Let me know if you have difficulty.

Recommended (and available to borrow from me):

Edmondson, AC. *Teaming: How Organizations Learn, Innovate, and Compete in the Knowledge Economy*. San Francisco: Jossey-Bass, 2012.

Pfeffer J. *Leadership BS: Fixing Workplaces and Careers One Truth at a Time*. New York: HarperCollins, 2015.

Burns, L.R., Bradley, E.H., and Weiner, B.J., eds. *Shortell and Kaluzny's Health Care Management: Organizational Design and Behavior*, 6th ed. Highly recommended for those with particular interest in healthcare organizational behavior or PhD studies.

Other Required Readings

Many of the journal articles and other assigned readings may be found on in the Health Sciences Library (HSL), and the *Sakai* website (Resources). Other texts, references, resources, and readings will be posted on *Sakai* as the semester progresses. Course texts and articles, by definition, become dated the moment they are completed, let alone published. The internet and other “real-time” sources, therefore, are of increasing importance, even if their reliability must be constantly held suspect. Students are encouraged to gather and share information from the published literature as well as web searches. Note, however, that complete citations of sources and websites must be provided in any submitted assignments. Please see the section on plagiarism and the UNC Honor Code later in this syllabus.

Course Website (<https://sakai.unc.edu/portal>)

The course website has been set up using *Sakai* and all students have been automatically enrolled. This website will be used extensively during the course, and students should check the site frequently for announcements, changes to the schedule, and access to readings. The Detailed Course Schedule, posted with the Syllabus on *Sakai*, is the major controlling document for dates of deliverables. Team sites on *Sakai* will be set up to facilitate team communication, sharing of documents and collaboration. Lecture slides and other material will be posted on the course website. All written assignments must be turned in via the *Sakai*

website assignment tool. Please use filename convention: **Lastname_Firstinitial Assign_num.**¹ Do not submit assignments in .pdf format; submit only MS Word, Excel, PowerPoint files, etc. Students will additionally be able to check grades on the course website.

Course Requirements and Expectations (see also the Detailed Course Schedule)

1. Lectures and Discussions:

The lecture portion of the course will include presentations by the instructor as well as guest presentations. In order to generate meaningful class dialogue, it is important that students come prepared to discuss the current topic by reading the assigned material ahead of time. When feasible, copies of slides will be posted in time for the class; otherwise, they will be posted following each week’s lecture or presentation. While class attendance in lectures will not be taken, it is expected that students will attend all sessions.

Guest Presentations: Managers and executives from a number of different health care settings will be presenting real-life, real-time managerial and leadership challenges from their particular organizations. Attendance at these presentations is mandatory, and class members are expected to ask relevant, clarifying questions and provide suggestions and input, acting in a “consulting role” for the guest. *Summary memos or PowerPoint slide decks are required assignments after each guest presentation.* Presentations will be video recorded, if possible, for subsequent viewing.

Expected protocol for guest presentations is shown in Table 1. Remember that guests take their own uncompensated time to come into our class, and they offer a great networking opportunity for mentoring, internships, and even jobs! *Take advantage of this!*

Table 1: Protocol for Guest Presentations

1. Honor the occasion:	2. Think of questions:	3. Thank the speaker:
<ul style="list-style-type: none"> • Arrive on time • Full class attendance • Make regular eye contact • Turn off Internet access (i.e., <i>no Facebook!</i>) 	<ul style="list-style-type: none"> • Write them down • Speak out and ask questions • Think of your role as being a consultant with fresh perspective and ideas 	<ul style="list-style-type: none"> • Round of applause • Go up afterwards to say thanks or to ask additional questions in person (at least 2-3 people) • <i>Network! Network! Network!</i>

Students will individually prepare a summary memo or a PPT slide deck, submitted on *Sakai*, following each guest presentation. The memos are intended to hone concise and focused written communication skills, which will have great applicability for subsequent courses and real-world communications. The memos can additionally be characterized as a “micro case study analysis” or an “executive summary.” Memos may be addressed to the guest presenter, or to different levels of a hypothetical organization, for example: (1) to a supervisor/boss; (2) to professional counterparts; (3) to staff/subordinates. General guidelines for memos will be posted on the *Sakai* site. Specific directions will be posted prior to the assignment due dates and may include an alternate reporting format (e.g., an annotated MS PowerPoint presentation).

The memos should be submitted in electronic form on the *Sakai* site and should indicate your audience, appropriately summarize the organizational/managerial issue(s) and suggest next steps. Think of these perhaps as an attachment to an email you might send. The body of each summary memo should be

¹ For example: Fried B Assign 1.docx (or .ppx, etc.)

approximately **400 words, +/- 10%**, which is less than two double-spaced pages. *Note: Charts, figures and tables do not count against the word limit as long as they are informative, well designed, and “reader friendly”, i.e., just not more verbiage themselves!* Be sure to put your name on all assignments, along with numbering the pages.

For ease of feedback and grading, submit memos in MS Word format with 12-point font, one-inch margins, double-spaced and left margin aligned. Use the file naming convention *lastname_firstinitial Assgn_num* described earlier. Do not submit in Adobe “.pdf” format because it makes feedback difficult. *Late assignments will not be accepted unless arranged at least 24 hours in advance. Permission for delayed submission will only be given for exceptional circumstances.*

Your managers, colleagues and staff, now and in the future, and regardless of policy, research, or management focus, are likely to have very short attention spans. Communication, therefore, must be short and to the point! Short memos require you to sharpen and wordsmith more than you would have to for a 10-page report. *Accurate spelling, good grammar, and overall readability are critical for establishing the face validity of each memo’s content.* Typos and egregious or sloppy errors, such as misspelling the guest’s name or organization, will be penalized. Class members are encouraged to use the UNC Writing Center (<http://www.unc.edu/depts/wcweb>) for writing suggestions and help. Additionally, the short book by Blake and Bly, *“Elements of Business Writing,”* is an excellent resource. The instructor and/or TA will provide timely feedback on memos to facilitate improvement over the semester. Previous students have found the short memos prepared in this class useful for job application writing samples.

2. Team Work:

Small group discussions provide opportunities for assessment, understanding, practice, and development of management skills. Each student is assigned to one team for the semester. Teams have been constructed to reflect the diversity across the class with regard to a number of factors, including degree program, work experience, gender, and race/ethnicity.

Comfort with presentations (i.e. being able to stand up in front of people in a relaxed and engaging manner) is an important professional skill that will be practiced and honed across several HPM classes, not just HPM 730. Presentation guidelines will be posted on the class website. For excellent presentation practice and feedback, there is a local chapter of Toastmasters International (www.toastmasters.org) that meets in the Health Sciences Library. Finally, there are a number of workshop options on presentation skills offered at the Kenan-Flagler UNC School of Business and other places on campus.

3. Clinical Rounds / Site Visits / IHI Leadership Module

Participation in clinical rounds or clinical conferences at UNC Hospitals, or site visits to different health care settings (e.g., nursing homes, public health clinics, health research organizations, or other health-related organizations), is required for all students. The clinical rounds/clinical conferences option is highly recommended for those students who have little to no exposure to clinical healthcare settings. For those already with significant hospital-based clinical experience, site visits to other health care delivery organizations will provide the opportunity to learn about the organizational culture and unique managerial challenges presented in these alternative healthcare settings. Students with a clinical background could consider shadowing an administrator. *Students should prepare questions ahead of time to maximize the benefit/usefulness of each site visit.*

Sign-up Process: The TA will assist in setting up the clinical rounds/conferences and identifying potential site visits. We may also be able to identify HPM alumni willing (and potentially very helpful) for hosting site

visits. The course TA will set up electronic sign-up forms for site visits. *Although each site visit will be slightly different, general protocol and etiquette for site visits is shown in Table 2. Please read and observe.*

Table 2: Protocol for Clinical Rounds and Site Visits

1. Before the Visit	2. Visit Day	3. Follow-up
<ul style="list-style-type: none"> • Complete HIPAA training online and submit required confidentiality and volunteer forms as needed. • Verify date and time of visit you have signed up for. <i>Notify the T.A. and/or instructor immediately of any conflict or problems. If an unavoidable problem on the day of the visit, attempt to reach the site visit coordinator. Do not be a "no-show"!!</i> • Check out websites and do some research on the site ahead of time • Prepare a list of questions, topics, or issues you might be interested in 	<ul style="list-style-type: none"> • Arrive 5-10 minutes early; allow time for getting lost, parking and traffic delays, obtaining on-site IDs if required, and confusion at the site-- the people you see may not know who you are • Introduce yourself as needed to whomever seems to be in charge • Dress appropriately and professionally; "business casual" usually works fine. Remember you are representing yourself, the department, and the school • Observe what is going on from an <u>organizational</u> perspective; ask questions and participate as appropriate • Enjoy the visit! Network! 	<ul style="list-style-type: none"> • Send an email thank-you to the site visit coordinator and other key individuals you may have interacted with • Prepare and submit the site visit report on the <i>Sakai</i> site within one week of the site visit

Clinical Rounds/Site Visit Reports:

Brief site visit reports, ~250 words (e.g., approximately one double-spaced page), are required for each clinical round/site visit. The reports should focus on organizational/managerial observations, and your personal/professional "take-aways." Observe what is going on or what the challenges are in terms of organizational issues: culture, communication, hierarchy, decision-making, etc. The reports should not be mere summaries of the visit, or of the organization itself. Site visit reports should be addressed to the HPM 730 course instructor. Use the same margin/font size format guidance as for memos. Site visit reports must be submitted via the course website within one week of the visit, and all site visits and reports must be completed and submitted the week before Thanksgiving Break.

Note that two clinical rounds or site visits are required. Documented completion of the Institute for Healthcare Improvement (IHI) Open School Leadership Module, however, may be substituted for one of the site visits.

4. Mid-term and Final Exams

Both the mid-term and final exam will consist of short answer/short essay questions. The final exam will be administered during the final exam period as determined by the University. The last lecture class preceding the exam will be utilized for review and questions, as well as for the course evaluation.

Class Requirements, Due Dates, Grading and Assessment

	Class Requirement	Due Date(s)	Full Points	Comments
1.	Assignments following each guest presentation (memo or Powerpoint, as indicated)	Due dates indicated on schedule	30 (max 6 pts/each)	<u>Memos</u> : ~400 words (<2 d.s. pages); see other specifications in syllabus <u>PPT presentations</u> : ~8-10 annotated slides; separate guidance will be provided
2.	Team case analyses	Dates indicated on schedule	25 (5 pts/each)	All team members will get same points for content and presentation.
3.	Clinical rounds, site visits or IHI leadership module	Reports due one week after visit, no later than Tues before Thanksgiving.	10 (5 pts/each)	~250 words; same format guidelines as memos For IHI leadership module submit copy of certificate
4.	Mid-term exam	In class, October 16	12	Short answer/essay format
5.	Team-based learning: governance memo and PowerPoint	November 6	11	Maximum 3 pages, double-spaced PowerPoint presentation limited to 8 minutes
6.	Final exam (during final exam period)	tba	12	Short answer/essay format; covers material since the mid-term exam
	Total Points		100	<60 = F; 60-69 = L; 70-89 = P; 90-100 = H

Course Policies

Electronic Devices (e.g., laptops, tablet computers, smart phones, etc.)

Use of devices in this class is encouraged for taking notes and quick look-up of information relevant to the discussion. Additionally, we will be using Google Forms, Poll Everywhere and Qualtrics as active classroom response systems, among possibly others, and devices are required for participation.

Note, however, that the use of electronic devices (including cell phones) for other purposes, including multi-tasking, checking email, sending instant messages, looking at Facebook, playing games, etc. is not appropriate, and rude to the presenter as well as inconsiderate to other class members. Complaints about electronic devices in the classroom come as much from students as from lecturers and guests. *Please restrict your use of electronic devices to only class-relevant activities.* Continued inappropriate use of electronic devices will be noted and can affect the course final grade. Relentless staring at your screen, even if class-related, is also disconcerting for any presenter. *Make regular eye contact and interact!*

Coordination with Other Classes

To the degree possible, the assignments, due dates, and exam schedule for this course will be coordinated with the other required HPM courses and instructors during this semester. A merged calendar of assignment and exam event dates covering all four classes may be available on the course website. The course schedule may also be subject to unavoidable change, however, which will be noted under “Announcements” on the *Sakai* site.

UNC Honor Code

The principles of academic honesty, integrity, and responsible citizenship govern the performance of all academic work and student conduct at the University. Your acceptance of enrollment in the University presupposes a commitment to the principles embodied in the Code of Student Conduct and a respect for this significant Carolina tradition. *Your reward is in the practice of these principles.*

Your participation in this course comes with the expectation that your work will be completed in full observance of the UNC Honor Code. Academic dishonesty in any form is unacceptable, because any breach in academic integrity, however small, strikes destructively at the University's life and work.

If you have any questions about your responsibility or the responsibility of faculty members under the Honor Code, please consult with someone in either the Office of the Student Attorney General (919-966-4084) or the Office of the Dean of Students (919-966-4042). You should also consult “The Instrument of Student Judicial Governance” (<http://instrument.unc.edu>).

Plagiarism

For guidance on plagiarism and how to correctly cite internet sources there are a number of tutorials and guidelines:

<http://www.hsl.unc.edu/services/tutorials/PlagiarismTutorial/intro.html>

<http://www.lib.unc.edu/instruct/plagiarism/>

<http://www.unc.edu/depts/wcweb/handouts/plagiarism.html>

<http://www.hsl.unc.edu/Services/guides/writing.cfm>

When in doubt, cite and over-document your sources!

Recognizing, Valuing, and Encouraging Diversity

The importance of diversity is recognized in the mission statement of HPM. In the classroom, diversity *strengthens* the products, *enriches* the learning, and *broadens* the perspectives of all in the class. Diversity requires an atmosphere of inclusion and tolerance, which oftentimes challenges our own closely held ideas, as well as our personal comfort zones. The results, however, create a sense of community and promote excellence in the learning environment. *This class will fully follow principles of inclusion, respect, tolerance, and acceptance that support the values of diversity.*

Diversity includes consideration of: (1) life experiences, including type, variety, uniqueness, duration, personal values, political viewpoints, and intensity; and (2) factors related to “diversity of presence,” including, among others, age, economic circumstances, ethnic identification, family educational attainment, disability, gender, geographic origin, maturity, race, religion, sexual orientation, social position, and veteran status.

Course Evaluation

HPM participates in the University’s online course evaluation system, enabled at the end of each semester. The system will be open for students to complete evaluations for a two-week period at the end of the semester. Your responses will be anonymous, with results only provided in the aggregate. Open-ended comments will be shared with instructors, but not identified with individual students. Your participation in the online course evaluation is an expectation, since providing constructive feedback is a professional obligation. Feedback is critical, moreover, to improving the quality of our courses, as well as for instructor assessment.

I hope you will enjoy and learn from HPM 730 this Fall! Please speak to the instructor or the TA if you have any questions, comments, or suggestions!