



THE UNIVERSITY  
of NORTH CAROLINA  
at CHAPEL HILL

## Strategic Thinking and Implementation HPM 955

(Credit Hours: 2)

Department of Health Policy and Management  
Gillings School of Global Public Health

### Summer 2015 Syllabus

Faculty: Susan Helm-Murtagh, MM, DrPH      TA: Daniel Odey Erim

Email: [helmmurt@email.unc.edu](mailto:helmmurt@email.unc.edu)      Email: [derim@live.unc.edu](mailto:derim@live.unc.edu)

Phone:

### Course Overview

This course is the first course in a three-course sequence on governance, strategy and financial leadership (HPM 955, HPM 958 and HPM 959). The sequence is designed to provide students with the tools they need to take their place as leaders of public health or healthcare organizations. This course introduces the concepts of governance, strategic thinking, systems thinking and implementation science. Students will learn the principle tenets of governance and how the board sets the tone and strategy for the organization.

## Learning Objectives and HPM Competencies

Course Learning Objective	Competencies
1 Build understanding of the fundamental principles of strategic thinking, governance and process	<ul style="list-style-type: none"><li>• Innovative thinking</li><li>• Strategic orientation</li><li>• Systems thinking</li></ul>
2 Reinforce the principles of governance and how they relate to the success of an organization	<ul style="list-style-type: none"><li>• Innovative thinking</li><li>• Strategic orientation</li><li>• Systems thinking</li></ul>
3 Develop a view of strategic management as a systematic, continuous decision based process. Introduce the concept of implementation science as it applies to the accomplishment of a strategy.	<ul style="list-style-type: none"><li>• Communication skills</li><li>• Innovative thinking</li><li>• Strategic orientation</li><li>• Systems thinking</li><li>• Implementation science</li></ul>
4 Develop an understanding of the importance of external forces on any organization and its strategic direction.	<ul style="list-style-type: none"><li>• Innovative thinking</li><li>• Strategic orientation</li><li>• Systems thinking</li></ul>
5 Be able to effectively work as a team and present ideas in a way that would enhance communication.	<ul style="list-style-type: none"><li>• Communication skills</li></ul>

### Website

HPM 955 has its own website using Sakai software. This syllabus is on the website, as well as all documents and assignments to support the course.

- Ginter, Peter M. Duncan, W. Jack ; Swayne, Linda E. Strategic Management of Health Care Organizations, Seventh Edition, Cambridge, MA: Blackwell Publishers, 2013. ISBN 978-1-118-46646-9 (GDS). Note that you can rent this book or buy it in hard copy or kindle version. Amazon.com [http://www.amazon.com/s/ref=nb\\_sb\\_noss?url=search-alias%3Daps&field-keywords=ginter%20duncan%20swayne](http://www.amazon.com/s/ref=nb_sb_noss?url=search-alias%3Daps&field-keywords=ginter%20duncan%20swayne).

**This book will be used for three semesters.**

- Best of Boards: Sound Governance and Leadership for Nonprofit Organizations , Thomas, Strom-Gottfried, AICPA, 2011. ISBN 978-0-87051-965-9. This book can be ordered from <http://www.cpa2biz.com/>

**This book will be also be used again in the fall semester.**

- How Good People Make Tough Choices- Rushworth M. Kidder, Harper, 2009. ISBN 0061743992

**This book will be used again in the fall semester.**

### **Books You May Find Helpful but Not Required**

#### ***Business Planning, Rhonda Abrams***

- The Strategy Paradox, Michael E. Raynor
- Question Based Selling, Thomas A. Freeze
- Your Gut is Still Not Smarter than Your Head: How Fact Based Marketing Can Drive Extraordinary Growth and Profits, Kevin Clancey, Peter Krieg
- Moral Courage- Rushmore M. Kidder, Harper 2006, ISBN- 0-06-059154-4
- Harvard Business Review on Corporate Ethics- Harvard Business School Publishing Corporation ISBN- 1-59139-273
- Leadership and Governance from the Inside Out- Robert Gandossy, Jeffrey Sonnenfeld, Wiley. 2004 ISBN 0-471-67185

### **Requirements of the Course**

**Class Activity- (30 points for the write up and 30 possible points for the role play for a total of 60%)**

#### **Management and the Board:**

There will be one group case this semester **per group**. You will be asked to apply strategic management and governance principles to a specific situation. Two groups will be assigned to each case. Each group will write up their case. Although the format is up to you, the required elements for analysis are included in a grade sheet. You will prepare the document as if you were giving it to a board. This means that the write up should be succinct and supported by graphics to make it easier to read.

When it comes time to present Groups 3 and 4 will play the role of management. They will provide a short brief (not the case writeup) to the participants that are playing the role of the board- Groups 1 and 2 and the class. The students that comprise each group, the case numbers and the roles are at the end of this document. The brief must be provided 48 hours before class to give the board time to review it.

Management will make their presentation on their ideas to the board (governance function) and the board will use the knowledge gained from their case analysis to challenge management. This is a very important point of strategy since the board leads and management presents their ideas and then is responsible for execution. The management group will prepare a PowerPoint presentation so that the groups not presenting can follow along.

**Groups have been assigned- see below- along with the case and the role of management or the role of those charged with governance. The cases have been selected for you.**

The case role-plays generally last one hour. The first 25 minutes is the presentation by management. The second 30 minutes is devoted to questions by the board. All members of the team must have an active role.

### **Postings (40% of the grade)**

Each week students are expected to post (by **Sunday at midnight** before the class on Tuesday evening) his/her comments and questions on the week's readings and on the question provided for the week. Since this is a significant portion of the grade, the postings should also include insights on the readings and bring in additional reading or experience you have with the subject matter. Comments on other students' posts are encouraged. There are no postings due in weeks where there is no class.

### **Grade Distribution by Assignment**

Postings- 40% of the grade (Sunday evening before Tuesday evening's class)  
Case and board/management role play - 50% (due the day of the facilitation- you may wish to have these pre-reviewed so you can implement constructive feedback)

### **Grading Scale**

90 or above (H)  
80 to 89 (P)  
70 to 79 (L)  
Below 60 (F)

**Confidentiality:** In order to encourage discussion about issues that are meaningful, students generally discuss issues that have arisen at their workplace. Therefore, the "cone of silence" applies. All students are expected to keep the information they learn about the organizations of other students confidential. If students are reluctant to talk about their organizations for some reason or another they can apply the readings to organizations with which they are familiar.

### 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 as they have during the long life of this institution. 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 most 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 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 (966-4084) or the Office of the Dean of Students (966-4042).

Read "The Instrument of Student Judicial Governance" (<http://instrument.unc.edu>).

### **Encouraging, Recognizing, and Valuing 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 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 UNC-CH’s online course evaluation system, enabled at the end of each semester by DigitalMeasures. Your responses will be anonymous, with feedback provided in the aggregate. Open-ended comments will be shared with instructors, but not identified with individual students. Your participation in 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.

**HPM 955- Summer 2015**  
**CLASS SCHEDULE**

<u>Date</u>	<u>Topic</u>
May 19, 2015 4:00 pm	<p><b>Module 1.1: Introduction to Governance and Strategic Thinking</b></p> <p><b>Rationale:</b> In this session we will introduce the concept of governance, define what it means in the context of the course and explore why there is so much focus on governance and strategy today.</p> <p><b>Discussion:</b> Strategic thinking &amp; Preparing a case presentation.</p> <p><b>Reading:</b> <i>Strategic Management</i> Chapters 1 and 2, and readings on the course site. Go to the forum for the activity and post.</p>
May 26, 2015 5:35 pm	<p><b>Module 1.2: Role of the Board and Management</b></p> <p><b>Rationale:</b> In this session we discuss the roles of management vs. the role of the board. We will also discuss what happens when the board and management disagree.</p> <p><b>Reading:</b> <i>Best of Boards</i> Chapters 1,2, and 4</p> <p><b>Assignment for discussion:</b> Post your questions to the forum and prepare for the online discussion. Go to the forum for the activity and post.</p>
June 30, 2015 5:35 pm	<p><b>Module 1.3: Understanding, Prioritizing and Addressing Risk</b></p> <p><b>Rationale:</b> In this session we discuss the how the board and management are responsible for managing risk in an organization.</p> <p><b>Reading:</b> <i>Best of Boards</i> Chapter 6</p> <p><b>Assignment for discussion:</b> Post your questions to the forum and prepare for the online discussion. Go to the forum for the activity and post.</p>
July 7, 2015 5:35pm	<p><b>Module 1.4 Introduction to Implementation Science</b></p> <p><b>Rationale:</b> In this session we will discuss the key concepts and principles of implementation science (IS) as they apply to strategic management.</p> <p><b>Special Guest:</b> Rohit Ramaswamy, PhD, MPH, Grad. Dipl. (Bios) and Director, Center for Global Learning</p> <p><b>Reading:</b> TBA</p>
July 14, 2015 5:35 pm	<p><b>Case Facilitation 1 - Groups 1 and 3</b></p> <p><b>Project HUGO at LHSC: Leading Urgent Change in Healthcare</b></p>
July 21, 2015 4:00 pm	<p><b>Case Facilitation 2 - Groups 2 and 4</b></p> <p><b>The Whitney Clinic</b></p>

**Groups for the Semester for the CASE**

<b>Group 1</b>	<b>Group 2</b>	<b>Group 3</b>	<b>Group 4</b>
<b>Case 1: Governance</b>	<b>Case 2: Governance</b>	<b>Case 1: Mgt</b>	<b>Case 2: Mgt</b>
Brian Castrucci David Adler Rachelle Johnsson Chiang	David Nimke Julie Osgood Erin Abrahamson	Hanna Tesfasyone Evan Simpson Lisa Strader	Greg Page Laurie Stradley Muswamba Mwamba

**Cases:**

**Groups 1 (governance) and 3 (management): Project HUGO at LHSC: Leading Urgent Change in Healthcare**

Harvard Business Publishing Product Link: <https://cb.hbsp.harvard.edu/cbmp/access/37120443>

**Description**

This case describes in rich detail the change challenge the director of pharmacy services at London Health Sciences Centre (LHSC) faces in September 2011. She is responsible for implementing project HUGO, an acronym for Health Care Under Going Optimization. HUGO is a computerized system that requires a switch from paper and pencil to fully electronic patient records. This project is the most complex and comprehensive one that London area hospitals have ever undergone: the project includes a total of 11 healthcare organizations in London and surrounding region, with expected project costs in excess of \$25 million. Implementing HUGO has the potential to save lives in the hospital, where critical errors are often linked to manual processes that involve multiple steps and people. Despite the strong reasons for implementing this project, the director expects significant resistance from nurses, doctors and staff who are used to their way of operating. It is clear that this change challenge involves not just the adoption of new technology but a significant cultural change.

The link above will get you a discount in purchasing the case. The cost is \$3.95

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**Groups 2 (governance) and 4 (management): The Whitney Clinic**

Harvard Business Publishing Product Link: <https://cb.hbsp.harvard.edu/cbmp/access/37120443>

**Description**

This case describes a community-based healthcare clinic and the issues facing the management and board of directors. The issues raised are common problems faced by all types of nonprofit organizations: insufficient fundraising and marketing policies to guide board decision making, confusion over staff and board roles in decision making, poorly thought-out bylaws that contribute to the confusion over board and staff roles, the challenge of harnessing the diverse backgrounds and opinions of a community-based board of directors, and lack of sound financial planning.

The link above will get you a discount in purchasing the case. The cost is \$3.95