# PHW227A: Health Care Finance

## Course Syllabus (Summer 2018)

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Course Description
This 3-unit online course provides the student with an understanding of the importance of finance in healthcare and provides basic financial and accounting skills needed by all health professionals. The course covers core concepts in both financial and managerial accounting and supports students in applying relevant financial techniques used by healthcare managers and those charged with key capital investment decisions including: ratio analysis, cost-volume profit analysis, discounted cash flow and forecasting.

Course Goals:
By the end of the course, through the evaluation methods noted on Table I (see Page 10 of this syllabus), students will demonstrate that they have a working understanding of:

- The theory, principles and application of healthcare finance and basic accounting
- Basic techniques to analyze the financial performance of an organization and its programs
- The role of financial planning in an organization’s success
- Financial and payment incentives facing the health care product, financing and delivery sectors
- How key investment decisions are considered and the analytics that support the process
Instructor Information

Faculty: Kimberly MacPherson, MBA MPH

Office hours: Monday 8-9am pacific by phone or Zoom, in 15 minute slots by advance appointment.

Email: For course-related communications please send me messages via the Canvas course mail tool. This will help me to more easily identify course-related emails for timely responses within 24-48 hours.

Kimberly MacPherson is the Executive Director of Health Management at the Haas School of Business and faculty in Health Policy and Management at the U.C. Berkeley School of Public Health. She directs the MBA/MPH program, the two-year MPH in HPM program, a one-year MPH for clinicians and the MPP/MPH offered with the Goldman School of Public Policy. She is also the Co-Director for the Berkeley Center for Health Technology (BCHT) which focuses on research and education around the key theme of the need to balance affordability and innovation. At UC Berkeley, Ms. MacPherson teaches a variety of graduate level courses at both Haas and SPH including Health Care Finance, Healthcare in the 21st Century, Trends in Biotech/Pharma, Commercializing Biotech, Unlocking Digital Health Innovation and Health Care Negotiations. Ms. MacPherson brings over 20 years of health industry experience spanning leadership roles in operations, management consulting and strategic/business planning and product development. She is a frequent speaker and moderator at conferences and organization-sponsored meetings/events. She is a member of the Board of Trustees for St. Francis Memorial Hospital and on the Dignity Health System Board Strategic Planning Committee in San Francisco. She holds a MBA from the Haas School of Business at U.C. Berkeley and a MPH from the School of Public Health at U.C. Berkeley.

Course Facilitators

Aaron Mendelson, MPH

Aaron is a recent Health Policy & Management graduate with a background in economic research and health care policy.

Office hours: TBD

Email: aaron_mendelson@berkeley.edu
David Proudman, MBA

**Office hours:** TBD  
**Email:** david_proudman@berkeley.edu

Diana Rios, MPH

Diana graduated from the Health Policy and Management MPH class in 2017. In addition to taking the HC Finance course with Kim MacPherson, she subsequently completed the Financial Management of Nonprofit Organizations course at GSPP with Brent Copen. Diana has seen and applied financial concepts to real-world applications in her work and looks forward to facilitating that connection for students this summer. Diana's healthcare interests include the use of digital health innovations to address social determinants of health. In addition to finance, Diana will be training for a half marathon and practicing yoga this summer.  
**Office hours:** Thursdays 7:30 - 8:30 AM beginning 7/12.  
**Email:** dianarios@berkeley.edu

Irina Titova

**Office hours:** TBD  
**Email:** titovairina@berkeley.edu

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**Student Support Contact Information**

**Program Manager**

Judy L. Smithson, M.Ed.
Email: oomph_prog_mgr@berkeley.edu
Office phone: (510) 642-8253

**Advising and Academic Planning**

Deborah Barnett, PhD  
Pedagogical Director  
dbarnett1@berkeley.edu
Student Resources

Student Counseling with University Health Services (Phone appointments available)
https://uhs.berkeley.edu/counseling

School of Public Health Library
http://www.lib.berkeley.edu/libraries/public-health-library

LibGuides
http://guides.lib.berkeley.edu/publichealth/oomph_all

Each OOMPH course has a LibGuide (Library Guide) linked from the bCourses site, created in collaboration between SPH librarians worked with OOMPH faculty. These “living” repositories of resources supporting each course will remain available to you as a student and a graduate of this program. These guides will grow and develop with input from OOMPH stakeholders.

BCourses 24/7 Technical Support

If you encounter any technical problems with bCourses such as problems opening the course site, accessing quizzes, discussions or submitting assignments or problems with mobile apps contact the Canvas 24/7 support from “Help” inside of any of your bCourses course sites or directly using live chat or phone:

- Live Chat: https://cases.canvaslms.com/apex/liveagentchat
- Phone: 855-308-2758

Course Format

The course will be taught via asynchronous narrated PowerPoint lectures, suggested guided readings and visual resources, case based homework assignments, and facilitated discussions. There will be one
proctored midterm exam and a final individual project on strategic investment analysis that will provide an opportunity to apply skills in analyzing a real financial decision-making situation. Participation will be stimulated using weekly topic discussions and the assignment to follow and prepare a financial status overview of a healthcare organization.

Course Schedule

The first three weeks of the course will focus on building the foundation of financial and managerial accounting concepts, how they are used in healthcare and introducing key analytic tools used by healthcare managers. To accommodate the range of student backgrounds in this course, some of the content is organized into Tool Kit and Real World modules. Those who have taken prior courses in basic accounting and finance principles or have related professional experience may choose to skim or skip the Tool Kit content. Note that you are still responsible for that content and it could appear on the midterm or be needed for a homework assignment. The Real World healthcare application modules will expand on the Tool Kit concepts to build understanding of the specific methods and interpretations that are seen in the healthcare sector. Overall, the content will have a strong focus on the healthcare delivery sector but examples and unique facets from other sectors (health plan, pharma/biotech, startups) will also be covered. Subsequent weeks will move to pricing and investment analysis and how all of these techniques are used in real world settings.

WEEK 1 – INTRODUCTION TO COURSE & FINANCIAL ACCOUNTING

Goal: Students understand the basics of financial statement composition and interpretation in healthcare, be able to calculate and interpret various financial ratios, appreciate why communicating fiscal health is so critical in healthcare (differences for publicly-traded FP vs NFP, etc)

Topics

- Overview of Financial Decision Making and Key Stakeholders/Users of Information
- Assessing Fiscal Health of an Organization and the Importance of Creditworthiness and External Funding For Capital Projects
- Structure and Key Components of Financial Statements for Health Care Organizations
  - Tool Kit
  - Real World
- Financial Ratio Analysis and Interpretation
  - Tool Kit
  - Real World

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Supporting Readings/Visuals

- Chapters 1, 3, 8, & 9 of *Essentials of Healthcare Decision-Making* (suggested for those with less background in healthcare and/or accounting concepts)
- Income statements for Humana (health plan) and Gilead (biopharma company) – 2017 10Ks for both are posted on bCourses – these include full financial statements plus notes
- Dignity Health earnings call - access it here (approx. 24 minutes including Q&A): [https://www.dignityhealth.org/about-us/investor-relations](https://www.dignityhealth.org/about-us/investor-relations)
- Video clip #1 of instructor’s interview of Dr. David Klein, MD, MBA, President & CEO of St Francis Memorial Hospital (a Dignity Health affiliate) in San Francisco, CA
- “A More Detailed Understanding Of Factors Associated With Hospital Profitability” by Ge Bai and Gerard F. Anderson, Health Affairs, May 2016   Also review follow-up May 6th blog post: [http://healthaffairs.org/blog/2016/05/06/understanding-hospital-profitability-continuing-the-conversation/](http://healthaffairs.org/blog/2016/05/06/understanding-hospital-profitability-continuing-the-conversation/)

Additional Resources

- ACHE definitions of key healthcare ratios  
- ACHE Operating Indicator Ratios (pdf in bCourses)
- Medicaid Risk-Based Managed Care: An Analysis of Financial Results for 2016,” Milliman Research Report, May 2016 (pdf on bCourses)

Activities

➢ *Excel readiness – as needed, utilize online tutorial and/or GSI*
➢ *Review income statement, lectures, and interview with Dr. Klein and the Dignity Health earnings webcast.*
➢ *Participate in the introductions discussion forum*
➢ *Complete Homework #1*
➢ *Consider different healthcare companies of interest to follow this semester*

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**WEEK 2 - MANAGERIAL ACCOUNTING & INTERNAL PERFORMANCE ANALYSIS**

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Goal: Students understand how costs “behave” and how to classify and measure. Be able to utilize key analytic tools to manage operations and inform decisions around products & service offerings.

Topics
- Overview of managerial accounting; Cost behaviors
- Key Managerial Analytics: Contribution Margins, Break-even Analysis, Cost-Volume-Profit Analysis & Overhead Allocation
  - Took Kit
  - Real World
- Budgeting, introduction to forecasting and other key managerial analytic techniques (cost variance analysis, service line analysis, simple payback)

Supporting Readings/Visuals
- Faculty reflection video from Week 1
- Chapters 14-17 & 23 of Essentials of HC Decision-Making (suggested)
  (additional resource for those who want one)

Additional Resources
- Cost-Volume-Profit Analysis- Chapter 3 - by Charles T Horngren (additional depth if needed)
- “Healthcare Cost Accounting: Preparing for ACOs, Population Health Management and Lowering the Cost of Healthcare,” by Steve Imus, MBA, Senior Vice President & Co-Founder Organizational Intelligence

Activities/Assignments
- Watch Porter-Kaplan video and share insights reactions via discussion forum for week 2
- Knowledge check - Cost behaviors, OH allocation
- Watch Faculty reflection video from Week 1
- Homework #2
- Confirm selection of a healthcare companies of interest to follow this semester - upload Word document with your choice

WEEK 3 - INVESTMENT ANALYSIS - PART 1
Goals: – Students understand how to develop robust assumptions to drive successful forecasting efforts, start to build comfort level with using DCF/NPV methods to assess investments

Topics

- Overview on healthcare investment decisions
- Time Value of Money, Compounding/Discounting; Cost of Capital
  - Tool Kit
- Forecasting Techniques; Key Assumptions, Demand Analysis (products and services)
- Concepts of Net Present Value/Discounted Cash Flow, Terminal Values
  - Tool Kit
  - Real World

Supporting Readings/Visuals

- Chapter 19 of Essentials of HC Decision-Making (suggested)
- “A Primer on the Time Value of Money,” Stern Business School (if need more depth)
  http://pages.stern.nyu.edu/~adamodar/New_Home_Page/PV Primer/pvprimer.htm
- Video interview clip with Carter Keller, COO GigaGen on his outlook on importance of forecasting
- Video clip #2 of instructor’s interview of Dr. David Klein, MD, MBA, President & CEO of St Francis Memorial Hospital (a Dignity Health affiliate) in San Francisco, CA
- Faculty reflection video from Week 2

Activities/Assignments

➤ Review posted instructions for Final Project
➤ Watch Carter Keller & Dr. Klein video clips and share insights, reactions via weekly discussion forum
➤ Watch faculty reflection video from Week 2
➤ Prepare for Midterm (proctoring any time next week)

WEEK 4 - INVESTMENT ANALYSIS - PART 2

Goals: Students will develop more insight into different format of net present value and applications in specialized areas including start-ups, social services. Students will also demonstrate proficiency in material from Weeks 1-3 via the proctored midterm

Topics
Internal Rates of Return, rNPV, Real Option Valuation, Social ROI
  - Tool Kit
  - Real World
- DCF For Start-ups (pre-revenue) and Sources of Investment Funds

Supporting Readings/Visuals
- “Using DCF in Biotech Investing” By Ben McClure, Investopedia, July 12, 2012
  [http://www.investopedia.com/articles/stocks/06/biotechvaluation.asp#axzz2left231w](http://www.investopedia.com/articles/stocks/06/biotechvaluation.asp#axzz2left231w)
- Video clip of Venture Capitalist Jim Trenkle, PhD, MBA on biotech investing in early stage firms
- Review most recent Rock Health Digital Health Funding –Year in Review, Rock Health
- Video from Aspen Ideas Festival (June 26, 2018): Panel of venture capitalists talking about 2018 Best Bets on Health
- Faculty reflection video from Week 3

Additional Resources
- “A Guide to Social Return on Investment,” Cabinet Office (UK) and SROI Network (pdf on bCourses)
- “The Growing Value of Digital Health,” IQVIA Institute, November 2017 (pdf in bCourses)

“Healthcare Activities/Assignments
- **Proctored midterm this week on Week 1-3 material**
- **Watch faculty reflection video from Week 3**

WEEK 5 - PRICING THEORY & ANALYSIS

**Goal:** Student will gain understanding of various pricing methods used in healthcare and a framework for thinking through the components and structure of what and how a product or service is priced

**Topics**
- Level and Structure of Prices
Specific Pricing Strategies- by sector
How Pricing and Reimbursement Drive Revenues
Linkage to Forecasting and Previous Analytic Techniques

Supporting Readings/Visuals

- Chapter 6 of Essentials of HC Decision-Making (suggested)
- Faculty-guest interviews with pricing experts from biotech (Dan Robison of Aimmune) and Video #3 with Dr. David Klein lens
- Faculty reflection video from Week 4 (comments on midterm)
- Danzon, PM, “Pricing and Reimbursement of Biopharmaceuticals and Medical Devices in the USA,” Encyclopedia of Health Economics, Volume 3, 2014 (on bCourses)

Additional Resources

- “Reconstructing Hospital Pricing Systems - a call to action for hospital financial leaders,” HFMA, 2007, (pdf in bCourses)
- “ The Disruptive Innovation of Price Transparency in Health Care, “ by Uwe Reinhardt, JAMA, November 13, 2013 (pdf in bCourses)
- “Private Health Insurance Premiums and Rate Reviews,” by Mark Newsom Congressional Research Service & Bernadette Fernandez Congressional Research Service, Cornell University ILR School DigitalCommons@ILR, January 11, 2011 (pdf in bCourses)

Activities/Assignments

- Watch video clips from Dan Robison (biotech) and Dr Klein on pricing in their domains and share insights reactions via weekly discussion forum
- Watch faculty reflection video from Week 4
- Check in on your selected company of interest to prepare for video presentation next week
- Homework #3 (note that this assignments links to the final project)

WEEK 6 - LINKING STRATEGY AND FINANCE FOR DECISION-MAKING
Goal: Students will develop a deeper understanding of the context in which financial decisions are made and how other key disciplines (e.g. policy/legal analysis, strategic assessment, etc) are key parts of any robust decision-making process

Topics
- Examples of Aligned Decision-making
- Use of Environmental and Competitive Analysis
- Implications of the Legal and Regulatory Environment of Healthcare

Readings/Visuals
- Read Chapters 4 & 13 of Essentials of HC Decision-Making (suggested)
- Faculty reflection video from Week 5
- “Linking Finance Strategy And Execution In Healthcare,” by Jay Spence, Axiom EPM,

Additional Resources (pdfs in bCourses)

Activities/Assignments

➢ Healthcare Company Financial Profiles – submit your video and watch at least three others and post comments for the weekly discussion forum
➢ Watch faculty reflection video from Week 5
➢ Kick-off of Final Case Project

WEEK 7 – FINAL INDIVIDUAL PROJECT

➢ Watch faculty reflection video from Week 6
➢ Final Case Project - Strategic Investment Analysis

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Course Grading

Grading will have four components:

Homework - Individual 30% (3 x 10% each)
Proctored Midterm 35%
Final Individual Project 25%
Participation 10%

**Excel readiness:** While many students will already be familiar with excel, some will need to learn (or relearn) the basics in order to complete the assignments in the course. We will use part of the intro lecture to describe the excel skills needed for the course and the resources available (e.g., online tutorials) to obtain them. The course GSIs will be available for excel support – do not delay on this if you think you need support!

Description of Course Requirements

**Homework (30% of final grade)**

**Objective:** to deepen understanding of class and reading topics using assigned cases.

**Overview:** There will be three case-based homework assignments, due back the Monday after the week they are assigned in. For the first two assignments, students may work in study groups. However, each student must turn in his or her own final answer (verbatim copying of joint solutions is not permitted). The 3rd HW assignment will be individual effort as it links to the final course project.

**Proctored Midterm Exam (35% of final grade)**

**Objective:** To provide an opportunity for students to demonstrate proficiency with concepts.

**Overview:** A proctored midterm will be held over the 4th week of the course and will be comprised of a combination of problems and short answers. All work must be shown to receive credit. Students are advised to read all instructions carefully, especially where it says to only complete X of Y questions on a page. One page, both sides of notes may be brought into the exam and some form of calculator will be needed but one that is not Internet connected or containing stored material (notes, formula, etc)

**Final Course Individual Project (25% of final grade)**

**Objective:** to deepen understanding of class and reading topics on investment analysis and to also incorporate elements previous components including forecasting, pricing and time value of money

**Overview:** Students will individually work a case study scenario using NPV/discounted cash flow analysis to support decision-making around a major capital purchase. Output will be both models/analysis and a PPT presentation that details assumptions, scenarios and recommendations
Participation (10% of final grade)

Objective: to deepen understanding of class and reading topics and support developing proficiency in presenting their thinking and analysis around healthcare finance

Overview: students are expected to engage in the five weekly discussion forums by posting at least once each week and commenting on another post at least once each week. Each student will also select a healthcare organization of interest, prepare a background profile on it and share key data/insights about the entity’s financial situation, news, strategies, etc via a short (5-7 minute) video that will be uploaded to a gallery. Students will be required to review at least three other videos and comment. One will be assigned (to ensure everyone is reviewed by another student) and the other two will be choice-based.

Course Structure:

This class is designed around several core topics with various forms of evaluation that are explicitly linked to the core concept areas covered:

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<th>Specific topics/analyses</th>
<th>Method(s) of Evaluation</th>
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</thead>
</table>
| Financial statement and fiscal health assessment   | ● Structure and components of key statements  
 ● Ratio analysis and interpretation  
 ● Relevance of external funding sources         | HW #1, midterm and threaded discussions                                                |
| Managerial accounting and internal performance analysis (CVP and simple payback analysis and projection) | ● Cost behaviors (direct, indirect, fixed, variable)  
 ● Contribution margins  
 ● Overhead allocation methods – total cost  
 ● Cost-Volume-Profit analysis  
 ● Budgeting                                           | HW#2, midterm and threaded discussions                                                |
| Investment analysis                                | ● Forecasting basics  
 ● Time value of money and discount rates  
 ● Net present value  
 ● Discounted cash flow including terminal values  
 ● Internal rates of return                          | Midterm (partial), Final project and threaded discussions                             |
| Pricing theory and application across key healthcare sectors | ● Level and structure of pricing  
 ● Specific pricing strategies  
 ● Link to performance analysis (CVP, etc)                      | HW#3 and threaded discussions                                                        |
| Venture capital and finance techniques for start-up firms (biomedical, IT, digital) | ● Sources of financing  
 ● Alternative valuation methods  
 ● Business models  
 ● Outlook for growth                                          | Discussions                                                                    |
Course Requirements

Required & Suggested Course Materials

**Essentials of Healthcare Finance 8th Edition**

by William O. Cleverley (Author), James O. Cleverley (Author)

ISBN-10: 1284094634

*Note from faculty: Specific chapters have been assigned as suggested readings, however, this book has a great deal of useful background data that complements the course so student may wish to read the entire book (especially if have limited US healthcare management background).*

Available in paperback or Kindle versions (~$65)

Essentials of Healthcare Finance provides health management students and executives with the most authoritative text on financial decision-making in the healthcare industry. This trusted resource explores finance theory and its practical application in health care across a full range of facilities, from hospitals and home health agencies to skilled nursing facilities, surgical centers and private physician practices. The vast, complex nature of the U.S. healthcare system renders traditional approaches to finance insufficient. Importantly, Essentials of Health Care Finance couches its discussion of economics, accounting and financial topics firmly within the unique context of the health care industry. Relevant and readable, this Eighth Edition of Essentials of Health Care Finance is fully revised and updated with current, real-world examples of financial problems and solutions as well as the latest financial ratio standards.

During this course, you will be provided with links to PDF files of articles and other materials from the UC Berkeley Library Collection. Please make sure you understand and follow the University of California Library Conditions of Use.

Completion of Course Modules

Students are expected to complete all modules, including viewing all lectures; completing all required readings and individual activities; and fully participating in class activities.
Participation in Course Activities and Discussions

A question will be posted on Canvas each week for class discussion. Students should complete lectures and readings in advance of responding. All students are required to post an initial response by Saturday Noon each week. This will be graded on a 0-2 scale based on effort and thoughtfulness.

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<tr>
<th>Deliverable</th>
<th>Points</th>
<th>Week</th>
<th>Due Date</th>
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<tr>
<td>Case Homework #1</td>
<td>10</td>
<td>Week 1</td>
<td>July 9 by 11:59 pm PST</td>
</tr>
<tr>
<td>Case Homework #2</td>
<td>10</td>
<td>Week 2</td>
<td>July 16 by 11:59 pm PST</td>
</tr>
<tr>
<td>Midterm</td>
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<td>Week 4</td>
<td>July 29 by 11:59 pm PST</td>
</tr>
<tr>
<td>Case Homework #3</td>
<td>10</td>
<td>Week 5</td>
<td>August 6 by 11:59 pm PST</td>
</tr>
<tr>
<td>5-7 minute oral presentation (by video)</td>
<td>10</td>
<td>Week 6</td>
<td>August 13 by 11:59 pm PST</td>
</tr>
<tr>
<td>Final Project PPT &amp; Financial Analysis</td>
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<td>Week 7</td>
<td>August 20 by 11:59 pm PST</td>
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Proctored Midterm Exam

Dates of the midterm exam are posted in the OOMPH Student Hub Academic Calendar. Details about the on campus offering of the course midterm are found on the Student Hub On-Campus Exam Proctoring Schedule. Details about the length of the exam and the materials you will be allowed to use during the exam will be posted on the course site.

Course Communication

As we move through the course materials, we want to hear how the course is going for you, your questions as well as how your personal and professional experiences add to our conversation. You can learn a lot from discussing the material in this course with each other and we encourage you to take advantage of the interactive components of the course to learn from each other.
Weekly Course Reader

A weekly course reader in pdf format which includes video transcripts and course readings will also be available on the course site for you to download.

Announcements

Announcements will be posted on the homepage of the course site. Please check regularly for updates.

Course mail

Course announcements will also be sent out through Canvas’ notification system. The default is to receive announcements via the Course Mail system, so make sure to check your Course Mailbox for message or wherever you receive notifications.

Office hours

Instructions for making an office hours appointment are found on the course site. Use the Office Hours button in the left hand navigation.

Policies

Due Dates

Please check the online course calendar for assignments and dates due. Assignments are generally due by 11:59 pm Pacific Time Mondays.

Late Assignments

Homework, discussion assignments, and final project deliverables will receive zero credit if submitted late with no prior communication. Please tell the faculty or course facilitator if you have an issue that might prevent timely submission. If we are informed in advance and approve the late submission, the student will only lose 5% of potential points for each day it is late, up to 5 days (25%). Please communicate in advance with instructors using Canvas Course Mail if you will not be able to meet course deadlines.

Disability Support Services

If you need disability-related accommodations in this class contact the UC Berkeley Disabled Students Program ((510) 642-0518 / web site: dsp.berkeley.edu). DSP services include accommodation letters, assistive technology and access services. An accommodation letter is needed in order for the instructor to grant an accommodation (e.g. extended exam time). Student must be assessed every semester to receive an accommodation letter.
Accommodation of Religious Creed

If you need to reschedule a test or examination for religious reasons such as holidays, inform the course instructor by the second week of the course. More information is available in the Religious Creed Policy page.

Policy on Sharing, Copying, or Reusing SPH Online Materials

Per the School of Public Health handbook for online students, course materials provided to students for exclusive use within the course may not be shared outside the course without written consent from the instructor. This includes course videos, lectures, and any journal articles that are not freely available on the Internet.

Course Evaluations

Course evaluations will be posted on the course site on Friday of Week 6 of the course and be available until the start of the final exam period. You will receive notification when evaluations are available. While participation in course evaluations is not graded, it is an important service to the instructor, program and the university. Your responses are anonymous and will not be available to the instructor until after final grades have been submitted. Your feedback is essential for understanding how courses offered by OOMPH can be improved and I thank you in advance for your participation and feedback.

Netiquette

In an online environment it is not possible to read your body language, tone of voice, or facial expressions. Therefore, a special set of rules has emerged for online communications, called Netiquette. Here are some basic Netiquette guidelines that should be followed in this course.

- Adhere to the same standards of behavior online that you follow in real life. Never mail or post anything you wouldn’t say to your reader’s face.
- Before posting to a discussion board, you should read prior messages to get a sense of the flow and language of the discussion. Keep your questions and comments relevant to the topic of the discussion.
- Don’t be afraid to ask questions within the course discussion group, or to share what you know.
- If you post a different viewpoint, first acknowledge what someone else has said. If you disagree with someone, it is better to start a message by briefly restating what the other person has said in your own words. This lets the other person know that you are trying to understand him/her.
- Support the points you make with examples or evidence from lecture, readings and/or from your own professional experience.
- Email messages should be considered private and not shared with others or quoted without permission. However, whatever you post to a newsgroup or discussion board is public. You never know who might read what you posted.
− Consider that a post may be the first – and lasting - impression you make on someone: Make sure your postings contain correct information. Check your spelling.
− Do not use ALL CAPS. It gives the impression that you are shouting.
− Do not send “Me Too!” or “Thank You” etc. messages to the entire group. Send those directly to the original poster.
− Cite all quotes, references and sources and respect copyright and license agreements.

Expectations of Student Conduct

As members of the academic community, students are responsible for upholding the standards of academic integrity. The basic rules of academic study and inquiry call for honesty in the preparation of papers and assignments, acknowledging sources of ideas, and taking examinations on the foundation of one’s own knowledge.

The Berkeley Campus Regulations Implementing University Policies, which address standards of student conduct, were amended in 1992 and are now published separately as “The Code of Student Conduct.” The complete document is available here: http://students.berkeley.edu/uga/conduct.pdf.

An excerpt from the introductory statement of principles is presented below:

The University of California at Berkeley is committed to providing its students the very best education that is possible within our resources. Thus, we try to attract the finest faculty members, we endeavor to maintain excellent classroom and laboratory facilities, and we support literally hundreds of co-curricular activities that enhance the quality of the Berkeley student’s experience. Yet, for the campus to function as a university community, it is not enough for the faculty and administration to carry out their respective obligations. It is equally important that every student assume his or her individual responsibilities.

Foremost among these, of course, is the student’s responsibility to perform academically to the full extent of his or her ability. In so doing, it is assumed that each student will observe the basic tenets of academic honesty. Therefore, any act of cheating or misrepresenting one’s own or someone else’s academic work will be considered a very serious offense. Intellectual products – including papers, exams, laboratory reports, articles, and books – are the heart and soul of any university’s academic life. We cannot permit them to be willfully compromised or expropriated.

Beyond our expectations of academic honesty – and of equal importance – is the assumption that the Berkeley student will accept his or her civil and civic responsibilities. What are these responsibilities? Simply put, they are the courtesies, considerations, and gestures of respect towards other members of the campus community that allow us all to express our personal freedoms without trampling on those of others.

The University is a fragile organism, requiring for its vitality consensus among its members concerning acceptable standards of conduct. These standards must both underlie and promote a degree of tolerance far greater than that which is exhibited in society at large. For it is not coercive law which restrains our actions, but a common purpose.

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That purpose is understood as guaranteeing the right of every Berkeley student to pursue his or her personal path to an education, to ask his or her very own questions, and to express his or her private reflections – in short, to evolve as an individual without undue interference. Any infringement of this right, whether in the classroom or elsewhere on campus, will be regarded as an offense against the entire campus community.

UCB Code of Student Conduct, 1992, pp. 1 and 2

Academic honesty

The School of Public Health and the University of California, Berkeley place a high value on academic honesty, which prohibits cheating and plagiarism. What is meant by “cheating is usually quite clear cut, but not so for “plagiarism”. The following memo, prepared by Professor William Bicknell at the Boston University School of Public Health for orientation of students, defines plagiarism quite well. Please read this carefully and discuss with your faculty adviser or with Associate Dean of Student Affairs if you have any questions.

“Plagiarism” a memo by Dr. William J. Bicknell: The purpose of this memo is to make clear:

What plagiarism is, how to avoid plagiarism and the consequences of plagiarism

Misunderstanding is widespread about what plagiarism is and whether or not it is a serious offense. It is a serious offense, and should be painstakingly avoided. Acceptable practice on citing sources of information differs as one moves from an academic environment to the world of work. There are also differences in custom between countries and cultures. This memo outlines practices appropriate to a U.S. academic environment.

What is plagiarism? Plagiarism is using someone else’s work, words, or ideas without giving them proper credit. An example of plagiarism, and an example of one acceptable way to avoid it, is shown below under the heading of Attachment 1.

How to avoid Plagiarism. Here are some simple guidelines for avoiding plagiarism:

1. If you use a phrase, sentence or more from any source, you must put them in quotation marks and cite the source in footnote.
2. If you recount someone else’s ideas in your own words (paraphrasing), you must provide a footnote at the end of the passage citing the source of the ideas.
3. if you draw on someone else’s ideas, even though you neither quote nor paraphrase them precisely, one of the following is called for:
   ● A footnote crediting the source of the ideas.
   ● A direct reference to the source within the text (for example, “Seligman has repeatedly made the point that.”, with facts of publication (title, etc.) provided in a footnote or bibliography.
Footnotes should be complete enough to enable the reader to accurately identify your sources. In addition to articles and books, sources may be personal communication, unpublished data, working memos and internal documents. A footnote should cite the author (if no author is named, the organization), as well as the title, date and page number(s). A bibliography, listing your sources but not linking them to specific points in your text, may well be desirable but is not a substitute for footnotes.

The Consequences of Plagiarism

The consequences of plagiarism are serious. Students can be expelled and lose all chance of completing their studies. Even if 99 percent of a student’s work has been above reproach, proven plagiarism could easily result in a degree not being granted.

Summary

A good paper typically demonstrates grasp of concepts, originality and appropriate attention to detail. The person who reads your paper assumes that the words and ideas originate with you unless you explicitly attribute them to others. Whenever you draw on someone else’s work, it is your obligation to say so. If you do not, you are operating under false pretenses. That is plagiarism.

Original Source

“Tribal pressures affect Kenyans’ behavior more than pronouncements arriving from the national seat of government but what ultimately counts is what an individual perceives as in his or her own best interest. For more than 80 percent of Kenya’s people who live and work on the land, children are seen as essential to survival and status. This is particularly true for women. Children and young adults provide an extra labor needed during peak planting and harvest times when everyone in the household must work long hours every day. For women, children are essential to lessen their heavy workload throughout the year: in a study of the Akamba tribe, three-quarters of the respondents gave this reason for having children.”


Plagiarism

Tribal pressures affect the Kenyan woman’s behavior more than pronouncements from the capital. She will perceive what is in her best interest. She sees children as essential to her survival and status. They provide the extra labor needed during peak planning and harvest times when everyone in the family must work for long hours.

Properly Footnoted Citation

Why do Kenyans have so many children? Mott and Mott write that “tribal pressures affect Kenyans’ behavior more than pronouncements arriving from the national seat of government but what ultimately counts is what the individual perceives as in his or her own best interest.”1 They point out that children are seen as necessary for a woman’s livelihood as well as her place in society. Children work on the shamba and assist with all kinds of labor: planting, harvesting, fetching firewood and water.2

2 Ibid: 7-8