

Course Syllabus  
PHW223: Strategy in Health Care Organizations

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## COURSE DESCRIPTION

This course will assist you in developing strategic analysis, planning, and implementation skills. The content is focused on endowing students with the skills that they will need to lead strategic change at a division, department, or enterprise-level within health care organizations. Emphasis is placed on the role of innovation and diversity, equity, inclusion, and belonging (DEIB) in strategy for modern health care organizations, as well as how to address significant changes in the external strategy environment.

Coursework includes the completion of a client-based small group strategy project, where teams of students will work with real-world health care clients to address a high-priority strategic decision that the client must make. This course requires general background knowledge of the healthcare system.

This syllabus, and the course content, builds on prior versions of the course taught by Dr. Steve Shortell, Kim McPherson, Joe Houska, and Dr. Kip Webb - the teaching team would like to thank these individuals for their contribution to its content and to the practice of healthcare strategy.

## COURSE LEARNING OBJECTIVES

By the end of this course, students should be able to:

- Define strategy, including what it is and what it is not, why it is important for your organization, and how it may or may not be different in healthcare
- Define mission, vision, and values, and connect mission, vision, and values to strategy
- Define value and the different ways value is created
- Define the concepts of VUCA, DEIB, and innovation, and their relevance to healthcare
- Describe Porter's 5 Forces model and how the different forces impact the competitive environment
- Describe Porter's value chain analysis and its uses
- Design a competitive assessment process appropriate for a particular organization, industry, and challenges
- Explain how to conduct a SWOT analysis of competitors and your own organization
- Apply the concept of the three generic strategies and provide examples of how healthcare organizations can achieve differentiation
- Demonstrate an understanding of how organizations define their customers and understand what they want
- Demonstrate understanding of approaches and likely success in establishing sustainable competitive advantage
- Understand the key marketplace drivers behind major healthcare trends
- Define innovation, and understand the importance of innovation to strategic success
- Understand Christensen's model of disruptive innovation and its relevance to strategic undertakings
- Understand the drivers underlying increased organizational consolidation
- Articulate the differences between strategic partnerships/alliances, mergers and acquisitions and the circumstances most necessary for their success
- Define change management
- Understand how to address the human dynamics underlying change management challenges
- Understand the concepts involved in utilizing the Change Management Curve
- Address the five roles leaders play in a change process
- Understand strategies to address resistance to change
- Define the key factors that shape an organization's culture
- Understand the link between cultural attributes, organizational outcomes and successful change processes
- Identify how diversity supports successful change
- Understand the three factors that contribute to the rate of change associated with an innovation
- Understand the successful rules for disseminating innovation
- Describe how and why to translate strategic goals into executable plans with measurable outcomes

- Describe the leadership skills and practices necessary to manage strategy execution
- Describe the basic terminology and approach to managing projects, programs, and portfolios
- Link performance measurement and managing work to desired outcomes
- Describe the benefits and challenges of data and how to display data to monitor progress
- Explain the different types of measures used to track performance and the pros and cons of each
- Describe the concept of balanced scorecards and how they are used to drive strategy
- Describe the DEIB considerations of building a balanced scorecard
- Discuss the impact of the COVID-19 pandemic on the healthcare delivery system and the implications for long-term success
- Describe how healthcare organizations can adapt strategy in the face of major environmental changes
- Describe the role of innovation in addressing major environmental changes
- Describe the competencies associated with effectively leading during ambiguity and crises

In addition, the course work will support a number of important MPH competencies in the area of leadership and professionalism, including:

- Demonstrate interpersonal skills and self-awareness to cultivate inclusive environments and establish and sustain professional relationships.
- Demonstrate the ability to work in a collaborative manner in a team setting.
- Demonstrate initiative, strategic thinking, and problem-solving skills.
- Describe the formal and informal decision-making structures and power relationships within an organization. Be able to identify stakeholders and decision-makers. Demonstrate confidence and competence to influence change.
- Effectively lead meetings and demonstrate group facilitation skills.
- Demonstrate professional quality presentation and group facilitation skills, and effective call to action.
- Communicate effectively verbally and in writing with a wide range of people in varying positions and organizations
- Apply skills in collaboration, coaching and influencing to achieve organizational or strategic initiative goals
- Utilize an inclusive approach to management decision making
- Evaluate and select options for effective diffusion of innovation within a healthcare organization

## PREREQUISITES

Current OOOMPH student

## INSTRUCTOR INFORMATION



Julie Brown, MBA, MPH  
[juliembrown@berkeley.edu](mailto:juliembrown@berkeley.edu)

Julie holds master's degrees in Public Health and Business Administration. She is a former Hospital and Health Plan CEO for Kaiser Permanente South San Francisco. Julie is Principal of Julie M. Brown and Associates, a management consulting firm specializing in strategic planning, operations improvement and leadership development.



Emma Dolan, MPP, MPH  
[emma.dolan@berkeley.edu](mailto:emma.dolan@berkeley.edu)

Emma received her Master's degrees in Public Health and Public Policy from UC Berkeley in 2011, and has worked for Kaiser Permanente since 2012. She is currently a Director of Strategic Implementation & Performance Improvement for KP's Southern California region in Pasadena.



Renee Clarke, MPH, RN, BSN  
[reneeclarke@berkeley.edu](mailto:reneeclarke@berkeley.edu)

Renee Clarke will be a second-year Doctor of Public Health student at UC Berkeley in Fall 2022. Her focus is on Maternal and Child Health Policy, Strategy, and Innovation to improve healthcare systems. Renee has 10 years of experience as a Registered Nurse in Neonatology, Pediatric Emergency Management, and Public Health Nursing. Renee's interest to impact and improve health outcomes extends nationally and internationally. She has served in places such as Niger (Africa), Milot, Haiti, and St. Thomas, Virgin Islands. She has great hopes for the future of healthcare and looks forward to co-learning with the teaching team and students in Strategy in Healthcare Organizations this Summer!

### Diversity, Inclusion and Anti-Racism Statement

Berkeley Public Health strives to create an anti-racist learning environment. As your instructors, we commit to teaching this course, to the best of our abilities, with an anti-racist, racial justice, and equity-minded lens. We acknowledge that mistakes may be made during this journey and ask that you commit with us to create a learning environment from which we can all grow, as we are all learning together.

We view diverse perspectives and the value and knowledge you bring as key to an enriching learning environment for all participants. We view this syllabus as a dynamic document oriented toward learning and not just coverage of material. Therefore, we may add or modify topics covered, assignments, and resources slightly, based on the needs and interests of students in the course and on current events. We welcome input at any time and invite constructive feedback on suggested modifications that may help improve the course now or in the future.

As your instructors, we commit to the following:

- Our learning environment is greatly strengthened by inclusion of relevant course content / information pertaining to BIPOC (Black, Indigenous, People of Color) communities (e.g., readings, videos, data, etc.). Course materials (including case studies, videos and authors) will include significant representation from Black, Indigenous, and other People of Color (BIPOC) communities; and course content will address issues pertaining to these groups and other marginalized communities;
- Guest speakers will demonstrate significant representation from the BIPOC community and/or represent individuals currently addressing strategic planning issues focused on the BIPOC community;
- We believe students are the experts of their own experiences. Your world lens is welcomed; as students, you are invited to lift up information and/or data that is relevant to the course material. Everyone is a teacher and everyone is a student;
- We cannot speak on behalf of all groups, or fully understand the issues, concerns and history of all BIPOC identities. However, we are willing to listen and learn, admit mistakes and engage in the ongoing work of cultural humility;
- Racism and injustice are perpetuated by silence. We commit to leading, to the best of our abilities, uncomfortable conversations around these issues in support of experiencing teachable moments, and invite all students to do the same even though we may not all be confident or fully-skilled in doing so;
- We will disrupt harmful power dynamics and engage in active bystander intervention to uncover and dismantle prejudice, bias, and other harmful practices;
- Language or comments that alienate, demean, and denigrate other students in the classroom will not be tolerated; those engaging in such behavior may be removed from the class;
- We will strive to create a safe and productive environment supportive of constructive learning and growth.

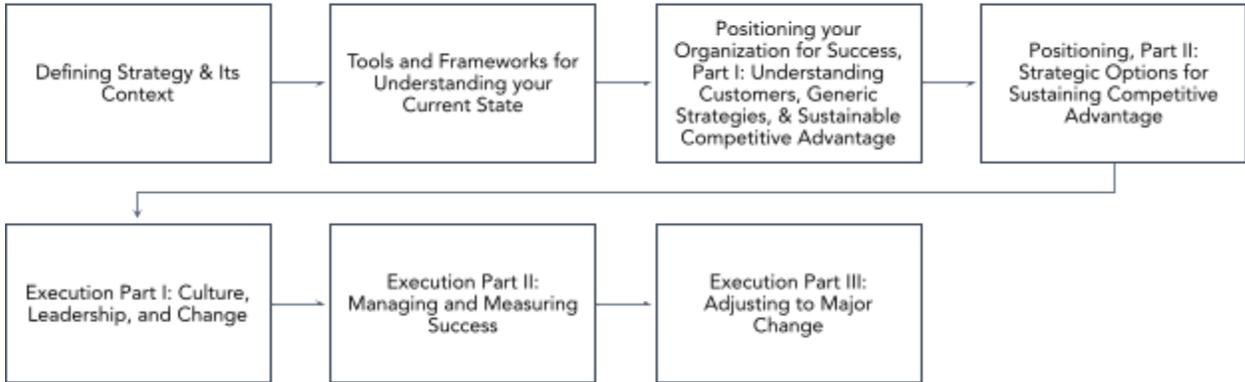
Please review the Health Policy & Management (HPM) Shared Norms at the end of this document that we will rely on to guide interactions throughout the course.

### Course Format & Schedule

Due to the accelerated nature of OOMPH courses, there is a lot of content to cover each week. You are expected to complete all modules, including viewing all lectures and videos and completing all required readings and individual activities; meet all internal team due dates and team report and presentation deadlines; and fully participate in class discussions.

We will use the calendar built into your course site as a central location for events and due dates. The calendar has links to all course materials and the drop boxes for assignments, so you may use the course calendar as a point of entry to access course materials.

High-Level Course Roadmap:



## DETAILED ROADMAP

Week 1
Introduction: Defining Strategy and Its Organizational Context
Learning Outcomes
<ul style="list-style-type: none"> <li>• Define strategy, including what it is and what it is not, why it is important for your organization, and how it may or may not be different in healthcare</li> <li>• Define mission, vision, and values, and connect mission, vision, and values to strategy</li> <li>• Define value and the different ways value is created</li> <li>• Define the concepts of VUCA, DEIB, and innovation, and their relevance to healthcare</li> </ul>
Readings & Videos
<a href="#">AG Lafley, Roger Martin &amp; Jennifer Riel, "A Playbook for Strategy: The 5 Essential Questions at the Heart of Any Winning Strategy." Rotman Magazine (Winter 2013)</a>
<a href="#">Video: Richard Rumelt, "Intelligent Strategy"</a>
<a href="#">Richard Horwath, "Discovering Purpose: Developing Mission, Vision and Value." Strategic Thinking Institute (2005)</a>
<a href="#">Video: Simon Sinek: "How Great Leaders Inspire Action"</a>
<a href="#">Nate Bennett and G James Lemoine, "What VUCA Really Means for You." Harvard Business Review (Jan-Feb 2014)</a>
<a href="#">Kulleni Gebreyes, Jessica Perez, David Rabinowitz &amp; Dr. Elizabeth Baca, "Activating Health Equity." Deloitte Insights (12 April 2021)</a>
<a href="#">Sundiatu Dixon-File, Kevin Dolan, Vivian Hunt &amp; Sara Prince, "Diversity Wins: How Inclusion Matters." McKinsey and Company (May 19, 2020)</a>
T. Khanna and V.K. Rangan, "Narayana Hrudayalaya Heart Hospital: Cardiac Care for the Poor (A)." Harvard Business School Case Study (June 22, 2005)
(Begin reading for Week 5) Chip Heath & Dan Heath, <a href="#">Switch: How to Change when Change is Hard</a> . New York City: Broadway (2010).
Lectures
<ul style="list-style-type: none"> <li>• Welcome to 223! Orientation to the Class (Live)</li> <li>• An Introduction to Healthcare Strategy</li> <li>• The organizational Context for Strategy: Mission, Vision, and Values</li> </ul>

<ul style="list-style-type: none"> <li>• VUCA in Healthcare</li> <li>• Diversity, Equity, Inclusion, and Belonging in Healthcare</li> <li>• Innovation in Healthcare</li> </ul>
Weekly Discussion Questions (Choose One)
<ul style="list-style-type: none"> <li>• Define value. What are some of the ways in which your organization or one you have had experience with creates value? Who captures that value? What more could you do to increase the total value or redistribute it?</li> <li>• What examples of VUCA do you see in the current healthcare environment?</li> <li>• Provide an example of how the pandemic has impacted issues of health equity in an organization with which you have familiarity. What did the organization do, and how did the response align with its mission/vision/values? What was the result?</li> </ul>
Case Study Discussion Questions (Choose One)
<ul style="list-style-type: none"> <li>• How has Dr. Shetty been so successful in the operation of his cardiac hospital? Is there anything special about inpatient heart care? What are the challenges that he will likely face in expanding his approach beyond heart care? Is this replicable without Dr. Shetty?</li> <li>• What challenges would you see for Dr. Shetty in establishing a similar hospital in the United States? Near the United States?</li> </ul>
Strategic Plan Milestones
<ul style="list-style-type: none"> <li>• Selecting an organization and completing the Project Description Form (submit by 11:59pm PST on July 5th)</li> <li>• Completing the Team Formation Worksheet with your team members; may be submitted for extra credit (submit by 11:59pm PST on July 5th)</li> <li>• Reviewing the Written Strategic Project Guidelines and developing a plan for completion (include milestones, dates &amp; team assignments)</li> <li>• Determining organizational stakeholders you will need to interview for primary research</li> </ul>
Week 2
Tools and Frameworks for Understanding your Current State
Learning Outcomes
<ul style="list-style-type: none"> <li>• Describe Porter's 5 Forces model and how the different forces impact the competitive environment</li> <li>• Describe Porter's value chain analysis and its uses</li> <li>• Design a competitive assessment process appropriate for a particular organization, industry, and challenges</li> <li>• Explain how to conduct a SWOT analysis of competitors and your own organization</li> </ul>
Readings
<a href="#">Michael E. Porter, "The Five Competitive Forces that Shape Strategy." Harvard Business Review (January 2008)</a>
<a href="#">Video: Michael Porter, "The Five Competitive Forces that Shape Strategy"</a>
Michael E. Porter, <u>Competitive Advantage</u> . New York: The Free Press (1985). Ch.1
<a href="#">Arthur Daemrich, "Using the SWOT Framework in Healthcare." Harvard Business Review (May 24, 2016)</a>

[Jada Bussey-Jones, Kimberly D. Manning & John-Otis Blanding, "Strategic Plan for Diversity, Equity and Inclusion 2019-2023." Emory University Department of Medicine \(2019\)](#)

[Nishadha Silva, "How a PEST Analysis Can Help With Strategic Planning." Business2Community \(Jan 7, 2016\)](#)

Videos: [Virtual Strategist, How To Perform](#) & [Use a SWOT Analysis](#).

[R. Ali & D. Luther, "Scenario Planning: Strategy, Steps and Practical Examples." Brainyard \(May 14, 2020\)](#)

[M. E. Porter, "What is Strategy?" Harvard Business Review \(Nov-Dec, 1996\)](#)

#### Lectures

- The Five Forces Model
- Porter's Value Chain Framework
- SWOT Framework
- Scenario Planning

#### Weekly Discussion Questions (Choose One)

- Consider the five forces model of Prof. Michael Porter. Using an organization with which you are familiar, describe the actual or potential impact of the five forces
- What do you see as the major strengths, weaknesses, opportunities, and threats of your organization or another organization that you know well? Include any PEST concepts that are relevant in your discussion.

#### Strategic Plan Milestones

- Begin executing on the plan developed in Week 1
- Based on your current knowledge, start conducting a SWOT analysis for your organization
- Analyze the mission, vision, and values of your organization; based on what you learned in Week 1:
  - o What are their strengths? Weaknesses?
  - o Based on what you know about the state of health care in 2022, how does what you have been tasked with help the organization address their external environment?
  - o Submit for extra credit points (submit by 11:59pm PST on July 11th)
  - o No specific length or formatting requirements, but question one can be addressed in bulleted format, and you would be able to address both questions in ~2 pages

#### Live Session One

This live session will be based on the "Emory Department of Medicine Strategic Plan for Diversity, Equity and Inclusion" and will cover:

- Using Porter's 5 Forces model, discuss the role of medical schools in the healthcare marketplace
- Assess the SWOT presented on page 20 of the case study; what are its strengths, and what might you add to make it stronger?

For those unable to attend, a written response to the case study is due on July 8th by 11:59pm PST and should address these same questions

Week 3
Positioning your Organization for Success (Part I): Understanding Customers, Sustainable Competitive Advantage, and Generic Strategies
Learning Outcomes
<ul style="list-style-type: none"> <li>• Apply the concept of the three generic strategies and provide examples of how healthcare organizations can achieve differentiation</li> <li>• Demonstrate an understanding of how organizations define their customers and understand what they want</li> <li>• Demonstrate understanding of approaches and likely success in establishing sustainable competitive advantage</li> </ul>
Readings
<a href="#">Pankaj Ghemawat, "Sustainable Advantage." Harvard Business Review (September, 1986)</a>
Michael E. Porter, <u>Competitive Advantage</u> . New York: The Free Press (1985). Ch. 2, and if your time permits, skim chapters 3-5.
<a href="#">Michael E. Porter &amp; Thomas H. Lee, "The Strategy That Will Fix Health Care." Harvard Business Review (October, 2013)</a>
<a href="#">W. Chan Kim &amp; Renee Mauborgne, "Blue Ocean Strategy." Harvard Business Review (October, 2004)</a>
<a href="#">Michael G. Jacobides, "In the Ecosystem Economy, What's Your Strategy?" Harvard Business Review (September-October, 2019)</a>
<a href="#">Leemore S. Dafny &amp; Victoria Marone, "Oscar Health Insurance: What Lies Ahead for a Unicorn Insurance Entrant?" Harvard Business School Case (August 15, 2018)</a>
Lectures
<ul style="list-style-type: none"> <li>• Generic Strategies</li> <li>• Defining Customers and Their Needs</li> <li>• Innovation in Strategic Positioning</li> <li>• Is Competitive Advantage Sustainable?</li> </ul>
Weekly Discussion Questions (Choose One)
<ul style="list-style-type: none"> <li>• What are some ways in which your organization (or an organization with which you are familiar) differentiates itself from its competitors? With what degree of success? How do you know? Discuss where the differentiation lies in the value chain as described by Porter.</li> <li>• What do you see as the major advantages and disadvantages of strategies based, alternatively, on cost leadership, differentiation, and focus?</li> <li>• Can competitive advantage be sustained over a long period? If so, how, and for what length of time? If not, why?</li> </ul>
Case Study Discussion Questions (Choose One)
<ul style="list-style-type: none"> <li>• What attributes (both internal and external) made the company's initial market entry so successful? Do you believe those factors are sustainable? Why or why not?</li> <li>• Given the company's mission and its initial performance, are the strategic options listed at the end of the overview the right questions Oscar should be exploring? Why or why not?</li> </ul>
Strategic Plan Milestones

- Completing all of your interviews by the end of the week, although some may continue based on availability, or as you refine your recommendations
- Completing a draft of the Background & Context and Organizational Assessment components
- Developing a framework for assessing the major strategic decision you are addressing
- Completing a web session check-in with your Course Facilitator (timing TBD)

#### Week 4

#### Positioning your Organization for Success (Part II): Strategic Options for Sustaining Competitive Advantage

#### Learning Outcomes

- Understand the key marketplace drivers behind major healthcare trends
- Define innovation, and understand the importance of innovation to strategic success
- Understand Christensen's model of disruptive innovation and its relevance to strategic undertakings
- Understand the drivers underlying increased organizational consolidation
- Articulate the differences between strategic partnerships/alliances, mergers and acquisitions and the circumstances most necessary for their success

#### Readings

[Traci Prevost, Wendy Gerhardt, Ion Skillrud & Debanshu Mukherjee, "The potential for rapid consolidation of health systems." Deloitte \(December 10, 2020\)](#)

[Rupal Malani, MD, Anna Sherwood & Sumya Sutaria, MD, "The Smarter Scale Equation." McKinsey \(May, 2013\)](#)

["Driving Innovation in Health Care Through Strategic Partnerships." Harvard Business Review Analytical Services Briefing Paper \(2021\)](#)

[Penelope Dash, MD, Jonathan Dimson, David Meredith & Paul White, "Marry in Haste, Repent at Leisure: When Do Hospital Mergers Make Strategic Sense?" McKinsey \(June 2012\)](#)

[Video: Clayton Christensen, "Disruptive Innovation Explained"](#)

[Christensen CM, Richard Bohmer & John Kenagy, "Will Disruptive Innovations Cure Health Care?" Harvard Business Review \(September-October, 2000\)](#)

[Ariel D. Stern & Sarah Mehta, "Maven Clinic: Women's Health in the Digital Age." Harvard Business School Case Study \(March 3, 2020\)](#)

#### Lectures

- The Case for Innovation
- Christensen's Model of Disruptive Innovation

<ul style="list-style-type: none"> <li>Organizational Consolidation and Innovation</li> </ul>
Forum Postings
<ul style="list-style-type: none"> <li>Using an organization you are familiar with, outline the considerations they ought to make when determining whether and how to grow</li> <li>What are some of the major organizational barriers to creativity and approaches for overcoming them? What can you do to promote greater creativity in your organization?</li> </ul>
Case Study Discussion Questions (Choose One)
<ul style="list-style-type: none"> <li>How would you counsel Ryder about the decision to grow the share of enterprise clients?</li> <li>The case study considers the potential to partner with health plans as an option for growth. If you were a health plan executive, what would you consider if approached by Maven with the opportunity for partnership?</li> </ul>
Strategic Plan Milestones
<ul style="list-style-type: none"> <li>Revise and submit your draft of the Background &amp; Context and Organizational Assessment components</li> <li>Complete a draft of your Major Strategies section</li> </ul>

Week 5
Execution Part I: Culture, Leadership, and Change
Learning Outcomes
<ul style="list-style-type: none"> <li>Define change management</li> <li>Understand how to address the human dynamics underlying change management challenges</li> <li>Understand the concepts involved in utilizing the Change Management Curve</li> <li>Address the five roles leaders play in a change process</li> <li>Understand strategies to address resistance to change</li> <li>Define the key factors that shape an organization's culture</li> <li>Understand the link between cultural attributes, organizational outcomes and successful change processes</li> <li>Identify how diversity supports successful change</li> <li>Understand the three factors that contribute to the rate of change associated with an innovation</li> <li>Understand the successful rules for disseminating innovation</li> </ul>
Readings
Chip Heath & Dan Heath, <u>Switch: How to Change when Change is Hard</u> . New York City: Broadway (2010).
<a href="#">Jennifer A. Chatman &amp; Sandra E. Cha, "Leading by Leveraging Culture." California Management Review (July 2003)</a>
<a href="#">Jennifer A. Chatman, "Culture Change at Genentech: Accelerating Strategic and Financial Accomplishments." California Management Review (Winter 2014)</a>
John Kotter, "Leading Change: Why Transformation Efforts Fail." Harvard Business Review (January, 2007)

<a href="https://hbr.org/2007/01/leading-change-why-transformation-efforts-fail">https://hbr.org/2007/01/leading-change-why-transformation-efforts-fail</a>
John Conger, "The Necessary Art of Persuasion." Harvard Business Review (May-June, 1998) <a href="https://hbr.org/1998/05/the-necessary-art-of-persuasion">https://hbr.org/1998/05/the-necessary-art-of-persuasion</a>
Boris Groysberg, Jeremiah Lee, Jesse Price, & J. Yo-Jud Cheng, "The Leader's Guide to Corporate Culture." Harvard Business Review (January 2018) <a href="https://store.hbr.org/product/the-leader-s-guide-to-corporate-culture/s18010?sku=S18010-PDF-ENG">https://store.hbr.org/product/the-leader-s-guide-to-corporate-culture/s18010?sku=S18010-PDF-ENG</a>
Michele Gelfand, Sarah Gordon, Chengguang Li, Virginia Choi & Piotr Prokopowicz, "One Reason Mergers Fail: The Two Cultures Aren't Compatible." Harvard Business Review (October 2, 2018) <a href="https://hbr.org/2018/10/one-reason-mergers-fail-the-two-cultures-arent-compatible">https://hbr.org/2018/10/one-reason-mergers-fail-the-two-cultures-arent-compatible</a>
Beth Williams, "Diversity and Inclusion Deliver Change Management Success." PrimeEast (No Date) <a href="https://forwardfocusinc.com/jumpstart-change/diversity-and-inclusion-deliver-change-management-success/">https://forwardfocusinc.com/jumpstart-change/diversity-and-inclusion-deliver-change-management-success/</a>
Donald Berwick, MD, MPP, "Disseminating Innovations in Health Care", JAMA April 16, 2003 <a href="https://jamanetwork.com/joiurnals/jama/fullarticle/196400">https://jamanetwork.com/joiurnals/jama/fullarticle/196400</a>
Lectures
<ul style="list-style-type: none"> <li>• Change Management Overview</li> <li>• Culture Change</li> <li>• Culture and Dissemination of Innovation</li> </ul>
Weekly Discussion Questions (Choose One)
<ul style="list-style-type: none"> <li>• Identify a significant issue in the performance of a healthcare organization or group of organizations and discuss how you might look for "bright spots".</li> <li>• What are the greatest barriers to change in your own organization? Describe how you might use a few of Switch's tactics and/or effective DIB strategies to improve your own management of change.</li> </ul>
Case Study Discussion Questions (Choose One)
<ul style="list-style-type: none"> <li>• What challenges and opportunities does a culture change effort as large and geographically diffuse as Cook's present?</li> <li>• What Switch concepts do you see incorporated into Cook's culture change initiative? What others might she have employed, and how?</li> </ul>
Strategic Plan Milestones
<ul style="list-style-type: none"> <li>• Revising your draft of your Major Strategies section</li> <li>• Completing a draft of your Implementation and Monitoring &amp; Evaluation sections</li> <li>• Submitting a report draft to the Canvas Drop Box by July 31st at 11:59pm PST; this is ungraded</li> <li>• Scheduling your final presentation based on dates provided; please pick a date when your client is available to attend, if possible</li> <li>• Drafting a plan (including team roles, deck development, talking points and anticipated questions/responses) for presentation in week 7</li> </ul>
Live Session Two

This live session will feature a guest speaker; participation in either Live Session Two or Three (in Week 6) is required. If you are unable to attend both, you must review a recording of one of the sessions and submit a one-page reflection by August 5th at 11:59pm PST. The reflection should cover the following questions:

- What did you learn from the presentation?
- What additional questions do you have for the speaker(s)?

## Week 6

### Execution Part II: Managing and Measuring Success

#### Learning Outcomes

- Describe how and why to translate strategic goals into executable plans with measurable outcomes
- Describe the leadership skills and practices necessary to manage strategy execution
- Describe the basic terminology and approach to managing projects, programs, and portfolios
- Link performance measurement and managing work to desired outcomes
- Describe the benefits and challenges of data and how to display data to monitor progress
- Explain the different types of measures used to track performance and the pros and cons of each
- Describe the concept of balanced scorecards and how they are used to drive strategy
- Describe the DEIB considerations of building a balanced scorecard

#### Readings

Vladislav Gil, Prateek Jain, V. Chandrashekhar & Arjun Saxena, "Strategic Performance Measurement & Creating a Common Language to Drive Execution." Price Waterhouse Cooper (October 6, 2017)

<https://www.strategyand.pwc.com/gx/en/insights/2017/strategic-performance-measurement/strategic-performance-measurement.pdf>

Ted Jackson, "30 KPIs to Measure Performance (& How to Choose & Track Them)." Clearpoint Strategy (No Date)

<https://www.clearpointstrategy.com/18-key-performance-indicators/>

Marc Harrison, "How a US Health Care System Uses 15 Minute Huddles to Keep 23 Hospitals Aligned." Harvard Business Review (November 29, 2018) <https://hbr.org/2018/11/how-a-u-s-health-care-system-uses-15-minute-huddles-to-keep-23-hospitals-aligned>

Robert Kaplan, "Using the Balanced Scorecard for Successful Healthcare M&A Integration" NEJM Catalyst (May 21, 2020)

<https://catalyst.nejm.org/doi/full/10.1056/CAT.20.0286>

Antonio Nieto-Rodriguez, "The Project Economy Has Arrived." Harvard Business Review (November-December, 2021)

<https://hbr.org/2021/11/the-project-economy-has-arrived>

Shantanu Nundy, Lisa A. Cooper & Kedar S. Mate, "The Quintuple Aim for Healthcare Improvement: A New Imperative to Advance Health Equity." JAMA (January 21, 2022)

[https://jamanetwork.com/journals/jama/fullarticle/2788483#:~:text=The%20triple%20aim—improving%20population,Star"%20for%20health%20c are%20improvement](https://jamanetwork.com/journals/jama/fullarticle/2788483#:~:text=The%20triple%20aim—improving%20population,Star)

Steven Aronowitz, Aaron De Smet & Deirdre McGinty, "Getting Organizational Redesign Right." McKinsey Quarterly (June 2005)  
<https://www.mckinsey.com/business-functions/people-and-organizational-performance/our-insights/getting-organizational-redesign-right>

Michael Mankins & Richard Steele, "Turning Great Strategy into Great Performance." Harvard Business Review (July-August, 2005)  
<https://hbr.org/2005/07/turning-great-strategy-into-great-performance?autocomplete=true>

Richard S. Kaplan & David P. Norton, "Using the Balanced Scorecard as a Strategy Management System." Harvard Business Review (July-August, 2007) <https://hbr.org/2007/07/using-the-balanced-scorecard-as-a-strategic-management-system>

#### Lectures

- Strategy Execution: Challenges and Best Practices
- Project, Program, and Portfolio Management
- Using Data to Drive Strategy (Parts I & II)

#### Weekly Discussion Questions (Choose One)

- In your experience, what are some factors that have led to the failure of strategic efforts? How might those failures have been avoided?
- One of this week's articles discusses the "quintuple aim" of access, service, cost, quality, provider wellness, and equity. What are different measures you have encountered for one or more of these aims, and what are the strengths and weaknesses of those measures?
- What are some of the ways in which organizations can align employee behaviors or activities to support strategic goals attainment?

#### Strategic Plan Milestones

- Completing your final paper and submitting to the Canvas Drop Box by 11:59pm PST on August 8th
- Completing and rehearsing your final presentation for week 7

#### Live Session Three

This live session will feature a speaker panel. Participation in either Live Session Two or Three (in Week 6) is required. If you are unable to attend both, you must review a recording of one of the sessions and submit a one-page reflection by August 5th at 11:59pm PST. The reflection should cover the following questions:

- What did you learn from the presentation?
- What additional questions do you have for the speaker(s)?

#### Week 7

##### Execution Part III: Adjusting to Major Change

#### Learning Outcomes

- Discuss the impact of the COVID-19 pandemic on the healthcare delivery system and the implications for long-term success
- Describe how healthcare organizations can adapt strategy in the face of major environmental changes

<ul style="list-style-type: none"> <li>• Describe the role of innovation in addressing major environmental changes</li> <li>• Describe the competencies associated with effectively leading during ambiguity and crises</li> </ul>
Readings
<p>“Addressing the Impact of COVID-19: Practicing Inclusive Leadership in Times of Crisis” Deloitte (2020)  <a href="https://www2.deloitte.com/content/dam/Deloitte/global/Documents/About-Deloitte/gx-thrive-tal-start-employee-education-training-in-crisispdf2.pdf">https://www2.deloitte.com/content/dam/Deloitte/global/Documents/About-Deloitte/gx-thrive-tal-start-employee-education-training-in-crisispdf2.pdf</a></p>
<p>Jordan Bar Am, Laura Furstenthal, Felicitas Jorge &amp; Erik Roth, “Innovation in a Crisis: Why it is More Critical Than Ever.” McKinsey (June 17, 2020)  <a href="https://www.mckinsey.com/business-functions/strategy-and-corporate-finance/our-insights/innovation-in-a-crisis-why-it-is-more-critical-than-ever">https://www.mckinsey.com/business-functions/strategy-and-corporate-finance/our-insights/innovation-in-a-crisis-why-it-is-more-critical-than-ever</a></p>
<p>HBR Big Ideas Series: The Burnout Crisis, specifically:  Jennifer Moss, “Beyond Burned Out.” Harvard Business Review (February 10, 2021)  Dave Lievens, “How the Pandemic has Exacerbated Burnout.” Harvard Business Review (February 10, 2021) and  Joshua J. Baugh &amp; Ali S. Raja, “Six Lessons on Fighting Burnout from Boston’s Biggest Hospital.” Harvard Business Review (February 10, 2021)  <a href="https://hbr.org/2021/02/beyond-burned-out?ab=seriesnav-bigidea">https://hbr.org/2021/02/beyond-burned-out?ab=seriesnav-bigidea</a></p>
<p>Gretchen Berlin, Aaron De Smet &amp; Maria Sodini, “Why Agility is Imperative for Healthcare Organizations.” McKinsey (May 1, 2017)  <a href="https://www.mckinsey.com/industries/healthcare-systems-and-services/our-insights/why-agility-is-imperative-for-healthcare-organizations">https://www.mckinsey.com/industries/healthcare-systems-and-services/our-insights/why-agility-is-imperative-for-healthcare-organizations</a></p>
<p>Ben Ramalingum, Benjamin Kumpf, Rahul Malhotra &amp; Merrick Schaefer, “How Low and Middle-Income Countries are Innovating to Combat COVID.” Harvard Business Review (June 9, 2021) <a href="https://hbr.org/2021/06/how-low-and-middle-income-countries-are-innovating-to-combat-covid">https://hbr.org/2021/06/how-low-and-middle-income-countries-are-innovating-to-combat-covid</a></p>
<p>“Pressure Rising: COVID-19’s Ongoing Impacts on Healthcare Labor Trends.” Healthcare Financial Management Association (August 5, 2021)  <a href="https://www.hfma.org/topics/finance-and-business-strategy/article/pressure-rising-covid-19s-ongoing-impacts-on-healthcare-labor-trends.html">https://www.hfma.org/topics/finance-and-business-strategy/article/pressure-rising-covid-19s-ongoing-impacts-on-healthcare-labor-trends.html</a></p>
Lectures
<ul style="list-style-type: none"> <li>• The Impact of COVID on Healthcare</li> <li>• VUCA, Revisited</li> <li>• Leading Effectively During Turbulent Times</li> <li>• Discussion with Meena Ramachandran, CPO of Brightline Health</li> </ul>
Weekly Discussion Questions (Choose One)
<ul style="list-style-type: none"> <li>• Reflecting on your professional experience during COVID, what did your organization do well to address the crisis? What might it have done better? Given current circumstances, what specific plan of action would you recommend leadership undertake moving forward?</li> <li>• What might the long-term implications of physician and staff burnout be on health systems and on health equity? What solutions oriented strategies should be explored to address the issues you’ve raised?</li> </ul>
Strategic Plan Milestones
<ul style="list-style-type: none"> <li>• Delivering your presentation</li> </ul>



## Required Course Materials

Videos and other resources are listed on weekly course pages. A weekly course reader in pdf format that includes video transcripts and many of the course readings will also be available on the course site for you to download.

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](#).

The following books can be found for sale through Amazon or other channels:

*Competitive Advantage: Creating and Sustaining Superior Performance*

Michael Porter. The Free Press, 1985.

ISBN: 0-684-84146-0

*Switch: How to Change Things When Change is Hard*

Chip Heath and Dan Heath. Broadway Books (division of Random House) 2010

ISBN: 978-0-385-52875-7 [This book is available online through the UCB library](#)

We will be reading and discussing several cases that will be available as part of your weekly readers, and are outlined in the weekly overviews above.

## Course Requirements, Assignments, and Expectations

Students are expected to complete all modules, including viewing all lectures; complete all required readings and individual activities; and fully participate in all class activities.

## Live Discussion Sessions for Weeks Two, Five and Six

In week two, we will offer real-time discussion sessions with the course instructors based on the “Emory Department of Medicine Strategic Plan for Diversity, Equity, and Inclusion.” In weeks five and six, we have set up a series of guest speaker presentations with healthcare industry representatives. These live sessions are meant to allow interaction with the teaching staff and industry experts, and an opportunity for you to deepen your understanding of the course content and its “real-world” applications.

We expect students to attend and participate in the case study live session, as well as 1 out of 2 of the live speaker sessions for credit (3 points per session); for students who cannot attend, we will provide the option of listening to recordings and completing a written response (questions outlined in the section above).

## Weekly Discussion & Case Study Forums

To reinforce key concepts in course materials, you will participate in weekly discussion forums, as well as case study forums in 4 out of the 7 weeks. For each of these forums, you will select and respond to one of the discussion questions by Saturday at 11:59 pm PST. After your first post, you are also expected to respond to other students’ answers with additional information, insight, or examples, as well as raising related questions. An ongoing dialogue on the answers and your responses to them are very much encouraged. Initial responses are expected to be completed by Saturday at 11:59 pm PST and subsequent responses and comments to other students’ comments by the following Monday at 11:59 pm PST.

## Written Strategic Plans and Presentations

Each student will be assigned to a small group for the purpose of developing a written strategic plan or analyzing and recommending a course of action for a strategic decision for a real-world health sector organization. Assignments will be based on student choice, on a first-come, first-assigned

basis. The final version of the plan will be due on August 8th by 11:59pm PST, and oral presentations of plans will be scheduled during week 7.

Each student will be expected to attend at least one of the other teams' presentations and submit a two-page commentary of their strategic plan and presentation (due August 13th at 11:59pm PST). See the documents entitled: "Project Description Form," "Written Strategic Plan Guidelines," and "Project Timeline" for further information on the form and process for the plans.

Since these projects entail working with real-life clients, there will inevitably be ambiguity in the exact course of the consulting engagements, and you will need to be ready to improvise, if needed, to deliver the most value you can to your client organization in the limited time available.

#### Course Grading

Grade	Range	Range Width	Verbal Descriptors
A (A- to A+)	3.4-4	0.6	Extraordinary Achievement, Exceptional, Excellent
B (B- to B+)	2.4-3.3	0.9	Very Good, Good
C (C- to C+)	1.4-2.3	0.9	Fair
D (D- to D+)	0.4-1.3	0.9	Barely Passed
F	0-0.3	0.3	Failed

A (4), B (3), C (2), D (1), F (0) grading (Excellent, Good, Fair, Barely Passed, Failed) with 3.7, 3.3, 2.7, 2.3, 1.7 for A-, B+, B-, C+, and C-. A+ is used to indicate extraordinary achievement. It is not associated with a point total. These scores are based on UCB standards.

Assignment	Points	Details
Weekly Discussion	14	7 Forums, 2 points each
Case Studies	8	4 Case Studies, 2 points each
Live Discussion Sessions	8	1 Live Case Study discussion: 3 points for participation 1 out of 2 Live Speaker discussions: 3 points for participation *Option for written responses if unable to attend
Strategy Project	50	Report: 32 points (team-based) Individual Contribution based on Peer Evaluations: 10 points Critique of another team's report and presentation: 8 points (individual-based)
Final Proctored Oral Report	20	Oral Presentation (team-based) with client

Extra Credit Opportunities (3)	+7	Strategy project mini assignments in Weeks 1 and 2, 3 points each Completion of 2 the BPH and OOMPH end of course evaluation (0.5 points each)
TOTAL	100	

### Course Communication

As we move through the course materials, we want to hear how the course is going for you, any questions you have, and your personal and professional experiences with the course content. We encourage you to take advantage of the interactive components of the course to learn and to teach.

### Announcements

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

### Course Introduction Session

We will schedule a live introduction session during the first week of the course to review course expectations and respond to your questions. The session will be recorded for those unable to attend.

### Course mail

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

### Office hours

Instructor office hours can be found on pages 2-3 of this document. To participate in office hours, use the Office Hours button in the left hand navigation pane of the course website and follow the instructions available on that page.

### Policies

#### Due Dates

- Weekly Forum Discussions of Readings and Lectures and Case Studies: Initial Forum postings due to be posted by Saturday at 11:59 pm Pacific Time and subsequent responses to classmates' posts by Monday at 11:59 pm Pacific Time.

Please check the online course calendar for other assignments and due dates.

### Late Work

Please communicate with instructors by email ahead of time if you will not be able to meet course deadlines. No late assignments are accepted without extenuating circumstances (such as illnesses or computer failures). Based on OOMPH policy, the late penalty is 10% per day deducted. If we have advance notice (on a one-time basis) or if it's a documented emergency, the late penalty is waived. The definition of extenuating circumstances is at the discretion of the instructor.

In all written work, attention will be given to the quality of presentation: clarity of ideas, sentence and paragraph construction, linkage of paragraphs, etc. Points will be based on clarity of ideas and writing as well as content.

### Course Evaluations

We strongly encourage you to complete the Berkeley Public Health and OOMPH end of course evaluations, which will be made available in week 6 or 7 on the BCourse site. Your feedback is incredibly helpful in shaping future changes to the course, and your responses are anonymous and will not be

available, even anonymously, to the instructor until after final grades have been submitted. Students who complete these evaluations can earn up to 1 extra credit point (0.5 points per each).

### SPH Course Policies

Descriptions of and relevant campus links to SPH school-wide course policies on Disability Support Services, Accommodation of Religious Creed, Course Evaluations, Academic Integrity can be found at:

<https://berkeley.box.com/s/knh3rbk9ikgvmca4ymy93msgj9bkebq5>

### HPM Shared Norms

Before participating in the group discussions and team projects, it is important that we have a shared set of norms with regard to interacting. The UC Berkeley SPH Division of Health Policy & Management (HPM) adopted these shared norms in 2020 (based on work by the Haas Dialogues on Race seminar):

#### Speak Your Truth

- Speak from your lived experience
- Acknowledge power & privilege
- Use the best words you have

#### Listen & Lead with Empathy

- Acknowledge the truth & nuance in others' lived experiences
- Listen without comparing experiences or thinking of how you will respond
- Acknowledge that we are all starting from different places and doing the best we know how
- Be curious - ask clarifying questions, seek to understand, and be committed to learning

#### Stay in the Courage Zone

- Lean into discomfort - be willing to address hard topics and express disagreement
- Acknowledge and address pain
- Notice and name to stay present and engaged

#### Care for Yourself and Others

- Assume positive intent
- Acknowledge impact
- Be patient with yourself and others
- Notice your emotions and ask for what you need, including requesting a pause or postponing of a discussion (yellow card/red card)
- Make room for all voices (step up to share your perspective / step back if you have already spoken more than others)

#### Direct Your Journey

- Say what is on your mind
- Interrogate your motives
- Own your journey - come prepared to engage & continuously reflect on your own journey

#### Respect Confidentiality

- During discussions of non-public situations, do not share names of persons involved
- Do not share outside of class any identifiable information from classmates' discussions

#### Expect and Accept Non-closure

