



**PHC 6148**  
**STRATEGIC PLANNING AND HEALTH CARE MARKETING**

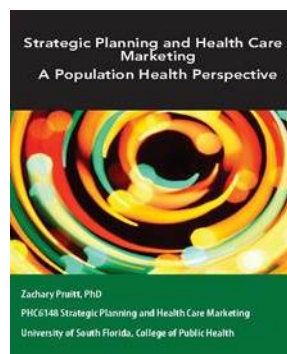
Summer 2016  
Section 001  
Mondays, 5:00-9:15 pm  
Location: CPH 2016

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Course Description: This course introduces the principles, methods, and concepts of strategic planning and healthcare marketing. Using a “flipped classroom” model, students will gain knowledge of these concepts through online lectures and case discussions, then apply the knowledge in guided learning projects. The cases and projects will focus on non-profit healthcare organizations.

Reply policy: Response to e-mail will be provided within 1 business day. Please contact Dr. Pruitt by **e-mail** to schedule a meeting or telephone conference.

Text:



**Strategic Planning and Health Care Marketing: A Population Health Perspective**  
Custom ISBN: [978-1-284-00754-1](https://publish.jblearning.com/ebooks)  
Price: \$37.16  
Go to <http://www.jblearning.com> and search for eBook's Access Code using the custom-made ISBN above, then purchase Access Code. To redeem Access Code and download eBook, go to <https://publish.jblearning.com/ebooks>. Go to [iTunes Store](#) to download eBook app.

Grading Scale: Grades for each requirement will be posted to the course website. **No extra credit will be offered in this course.** Final course grades will be assigned as follows: A 90-100 points; B 80-89.9; C 70-79.9; D 60-69.9; F <60

Course Expectations This is a 3 credit course. Students can expect 4 hours of work outside of class each week, including readings, reflective learning journaling, team case analyses, and online lectures. Group project work can be done during the scheduled class meeting time.

## **STUDENT ASSESSMENT**

Students will develop knowledge and skills through online lectures, Team Case Analysis, in-class student briefings, project-related journaling, two written group projects (strategic plan and marketing plan), and two class project presentations. According to the standards devised by the National Center for Healthcare Leadership, Competency Integration in Health Management Education—A Resource Series for Program Directors and Faculty (2006), **100%** of this course's assessment methods meet the higher-level standard.

<b>Assessment Strategy</b>	<b>Assessment Activity</b>	<b>Assessment Method</b>	<b>Percentage</b>
1	Team case analysis (11 cases)	Case review and feedback	22
2	Reflective learning journaling (8 topics)	Journaling	8
3	Peer feedback from team on 3 presentations	Observation Checklist	10
4	Team peer review (strategic plan)	Team effectiveness assessment	10
5	Team peer review (marketing plan)	Team effectiveness assessment	10
6	Strategic planning project	Project review and feedback	20
7	Healthcare marketing project	Project review and feedback	20

Team Case Analysis:	Within their assigned group, students will actively engage in analyzing short case studies that are designed to present realistic healthcare strategy and marketing situations. The assigned cases are outlined in the class schedule below. See Team Case Analysis rubric.
Reflective Learning Journaling:	Journaling enables reflection on the course learning and program competencies. Students will be required to provide a written response eight learning topics provided by Dr. Pruitt in Canvas. Assessment will be based on the depth of reflection (review/analysis/evaluation) of your learning process and/or performance (see Journaling rubric). Journaling should take approximately 15 minutes for each weekly topic.
Peer Feedback from Team on Presentations:	All students will be required to present <u>at least</u> three presentations to their project work group. While no more than five minutes long, these presentations should be professional, thorough, and concise. The topics will be assigned by the work group (not by Dr. Pruitt) in a previous class session and will be based on the project development. Your group will assess your presentation, work product, and ability to answer questions on assigned topic. See Peer Feedback from Team on Presentations rubric.

Strategic Plan:	Based on the guided learning of Part One of this course, the Strategic Plan simulates a realistic strategy project in a healthcare organization. Assessment of the group-based strategic plan projects are composed of three parts. First, group members will complete a team effectiveness assessment for each of their peers (10%). Next, the professor will assess the written component of the project worth 15% of your final grade (see Written Strategic Plan rubric). Finally, a special guest reviewer will assess the presentations of the Strategic Plans worth 5% of your final grade (see Strategic Plan Presentation rubric).
Marketing Plan:	Based on the guided learning of Part Two of this course, the Marketing Plan simulates a realistic marketing project in a healthcare organization. Assessment of the group-based Marketing Plan projects are composed of three parts. First, group members will complete a team effectiveness assessment for each of their peers (10%). Next, the professor will assess the written component of the project worth 15% of your final grade (see Written Marketing Plan rubric). Finally, a special guest reviewer will assess the presentations of the Marketing Plans worth 5% of your final grade (see Marketing Plan Presentation rubric).
Class Presentations:	Students will formally deliver information to the class in a well-prepared format that will require analysis, synthesis, and preparation. Presentations will be required for both the Strategic Plan and Marketing Plan projects. Business appropriate attire must be worn for presentations.
Team Effectiveness Peer Assessment:	Working effectively in teams is a critical part of healthcare management. As such, a significant part of student assessment for this course is based on the evaluations of student contribution to the projects by their peers. Team effectiveness assessment will be required for both the Strategic Plan and Marketing Plan projects.

## **COURSE POLICIES**

Incomplete Policy:	COPH policy: <a href="http://publichealth.usf.edu/academicaffairs/academic_procedures.html">http://publichealth.usf.edu/academicaffairs/academic_procedures.html</a>
Attendance and Class Participation:	This class will meet one day each week in multiple small groups assigned by Dr. Pruitt. The emphasis in class time will be on group project work.
Grading Policies:	Assignments will not be accepted after the assigned due date. In the event of a medical or other emergency, students should contact the instructors prior to the due date to make alternative arrangements. Evidence of an emergency situation may be required.

## **COURSE OBJECTIVES**

At the conclusion of the course the student should be able to:

1. Understand the principles of governance and how they relate to strategic management.
2. Identify critical steps in development of a successful strategic plan.
3. Apply analytical thinking to external healthcare environment assessments, such as regulatory and legal analysis, environmental scanning, and competitive analysis.
4. Apply analytical thinking to internal assessments, such as core competencies, strategic positioning, and competitive advantage.
5. Analyze financial impact of various reimbursement methods utilized in U.S. healthcare.
6. Apply organizational structure concepts to strategic management.
7. Apply operationalized performance metrics to healthcare strategic and marketing plans.
8. Apply public health values and population health management principles to strategic plans.
9. Apply marketing principles, including community engagement and physician relationship management, within the context of strategic choices.
10. Demonstrate written communication skills.
11. Demonstrate oral presentation and communication skills.
12. Demonstrate professionalism, ethical decision making, and operations management skills through completion of team-based projects.

## **COURSE COMPETENCIES**

<b>Competency</b>	<b>Learning Objectives</b>	<b>Assessment Strategy</b>
A.1. Operational Definitions	8	7
A.2. Performance Measurement		
A.3. Information Systems and Technology		
A.4. Quantitative Analysis		
A.5. Operations Management		
A.6. Analytical Thinking	4, 5	6, 7
B.1. Operational and Strategic Planning	2, 3, 4, 5, 6, 7	1, 6, 7
B.2. Marketing	10	1, 6, 7
B.3. Mgt. of Organizational Design		
B.4. Leadership and HR Management		
B.5. Organizational Governance		
B.6. Physician Relations and Engagement		
C.1. Healthcare System (org. & financing)		
C.2. Community Engagement	10	6, 7
C.3. Legal and Regulatory Environment	4	6, 7
C.4. Public Policy		
C.5. Understanding Health Disparities		
D.1. Budgets		
D.2. Cost Accounting		
D.3. Financial Statement Analysis	6	6
D.4. Financial Mathematics		
D.5. Reimbursement Methods		
D.6. Economic Evaluation		
E.1. Values and Ethical Decision-Making	13	2
E.2. Written Communication	11	1, 2, 4-7
E.3. Oral Communication	12	3, 6, 7
E.4. Professionalism	13	3, 6, 7

## **CLASS SCHEDULE**

Please prepare for each week's class by completing the Prior to Class Activities. Each online lecture will be no more than 30 minutes in duration.

### **Part One: Strategic Planning and Management**

#### **Week 1: May 16, 2016**

##### Prior to Class Activities

*Online Lecture:* Environmental Analysis: Internal

*Reading:* Population Health in Action: Successful Models (Nash, Ch. 14); Strategic Development and the Strategic Mindset (Hillestad & Berkowitz, Ch. 1); Internal Audit of Strategic Assets: Resources and Competencies (Moseley, Ch. 2.)

##### In-Class Activities

Introduction to Course

Begin work on group-based Strategic Planning Committee Suggestions

#### **Week 2: May 23, 2016**

##### Prior to Class Activities

*Online Lecture:* Environmental Analysis: External

*Team Case Analysis 1:* Accountable Care in the Safety Net: A Case Study of the Cambridge Health Alliance (Commonwealth Fund, see Canvas)

*Reading:* External Environmental Assessment: Law, Economics, Demographics, Technology (Moseley, Ch. 3); External Environmental Assessment: Market and Customers (Moseley, Ch. 4); External Environmental Assessment: Industry and Competitors (Moseley, Ch. 5).

##### In-Class Activities

Strategic Planning Committee Suggestions presentations (not graded)

BCG Matrix & S.W.O.T.

Introduce strategic planning structure

Begin work on group-based Strategic Plans

##### Due

Strategic Committee Suggestion Presentations (not graded)

Team Case Analysis 1

Journal Entry 1

Journal Entry 2

#### **Week 3: May 30, 2016**

##### Prior to Class Activities

*Online Lecture:* Strategic Positioning

*Team Case Analysis 2:* Fortenberry Case, Ch. 39 "Defining Competition"

*Reading:* Formulating Corporate-Level Strategy (Moseley, Ch. 7);

##### In-Class Activities

No class, Memorial Day holiday

Due

Team Case Analysis 2

Journal Entry 3

**Week 4: June 6, 2016**

Prior to Class Activities

*Online Lecture:* Strategic Business Unit (SBU) Strategy

*Team Case Analysis 3:* Fortenberry Case, Ch. 32 "Stopping Outshopping"

*Reading:* Formulating SBU-Level and Functional Area Strategy (Moseley, Ch. 8)

In-Class Activities

Continue work on group-based Strategic Plans

Due

Team Case Analysis 3

Journal Entry 4

**Week 5: June 13, 2016**

Prior to Class Activities

*Online Lecture:* Performance Monitoring

*Team Case Analysis 4:* Monarch HealthCare: Leveraging Expertise in Population Health Management (Commonwealth Fund, see Canvas)

*Team Case Analysis 5:* Balanced Scorecard Case Study 1 (Berger text, see Reading)

*Reading:* See Canvas

- "Establishing the Use of Balanced Scorecards to Improve Goal Setting and Monitoring" (Ch. 4, pgs. 75-79, The Power of Clinical and Financial Metrics.)
- Gurd, B., & Gao, T. (2007). Lives in the balance: an analysis of the balanced scorecard (BSC) in healthcare organizations.

In-Class Activities

Continue work on group-based Strategic Plans

Due

Team Case Analysis 4

Team Case Analysis 5

Journal Entry 5

**Week 6: June 20, 2016**

Prior to Class Activities

*Online Lecture:* None

*Reading:* None

In-Class Activities

Strategic Plan presentations

Due

Group-based written Strategic Plan (through turnitin)

Strategic Plan presentation

Strategic Plan Team Effectiveness Peer Assessments

## **Part Two: Healthcare Marketing Plans**

### **Week 7: June 27, 2016**

#### Prior to Class Activities

*Online Lecture:* Marketing Plans

*Team Case Analysis 6:* Fortenberry Case, Ch. 17 "Battling Pies in the Sky"

*Team Case Analysis 7:* Fortenberry Case, Ch. 26 "Opening Minds"

*Reading:* Understanding the Strategic, Business, and Marketing Planning Process (Hillestad & Berkowitz, Ch. 2); Step 4: Determining Marketing Actions (Hillestad & Berkowitz, Ch. 7)

#### In-class Activities

Begin work on group-based Marketing Plans

#### Due

Team Case Analysis 6

Team Case Analysis 7

Journal Entry 6

### **Week 8: July 4, 2016**

#### Prior to Class Activities

*Online Lecture:* Healthcare Product/Service Strategy

*Team Case Analysis 8:* Fortenberry Case, Ch. 33 "A Few Degrees off Target"

*Team Case Analysis 9:* Fortenberry Case, Ch. 37 "Changing Times"

*Reading:* Marketing and Communication (Nash, Ch. 17)

#### In-class Activities

No class, Independence Day holiday

#### Due

Team Case Analysis 8 & 9

Journal Entry 7

### **Week 9: July 11, 2016**

#### Prior to Class Activities

*Online Lecture:* Marketing Management

*Team Case Analysis 10:* Fortenberry Case, Ch. 4 "Expectations and Experiences"

*Team Case Analysis 11:* Fortenberry Case, Ch. 24 "The Onsite Advertising Agent"

*Reading:* Step 5: Integration of the Marketing Plan with the Business Plan and Marketing Planning Process (Hillestad & Berkowitz, Ch. 8)

#### In-class Activities

Continue work on group-based Marketing Plans

#### Due

Team Case Analysis 10 & 11

Journal Entry 8



## **Week 10: July 18, 2016**

### Prior to Class Activities

Online Lecture: None

### In-class Activities

Present Marketing Plans

### Due

Group-based written Marketing Plan (through turnitin)

Marketing Plan presentation

Marketing Plan Team Effectiveness Peer Assessments

## **USF POLICIES**

Student Handbook: [http://www.sa.usf.edu/dean/docs/USF\\_handbook.pdf](http://www.sa.usf.edu/dean/docs/USF_handbook.pdf)

Student Conduct: USF Student Rights/Responsibilities:  
<http://www.sa.usf.edu/srr/page.asp?id=81>

USF Student Code of Conduct: <http://www.sa.usf.edu/srr/page.asp?id=88>

Academic Dishonesty: Disruption of the academic process and violations of the policies regarding academic integrity will not be tolerated. Review USF policies on Disruption of the Academic Process and the Academic Integrity of Students at:  
<http://generalcounsel.usf.edu/regulations/pdfs/regulation-usf3.025.pdf>

Plagiarism: Plagiarism will not be tolerated and is grounds for failure. Review USF Academic Dishonesty and Disruption of Academic Process Policy at:  
[http://www.grad.usf.edu/inc/linked-files/USF\\_Grad\\_Catalog\\_2011-2012.pdf#page=39](http://www.grad.usf.edu/inc/linked-files/USF_Grad_Catalog_2011-2012.pdf#page=39)

The University of South Florida has an account with an automated plagiarism detection service (*Turnitin*), which allows instructors and students to submit student assignments to be checked for plagiarism. I (the instructor) reserve the right to 1) request that assignments be submitted as electronic files and 2) submit students' assignments to *Turnitin*, or 3) request students to submit their assignments to *Turnitin* through myUSF. Assignments are compared automatically with a database of journal articles, web articles, the internet and previously submitted papers. The instructor receives a report showing exactly how a student's paper was plagiarized. Instructions to submit an assignment using Safe Assignment.

Plagiarism tutorial: <http://davon.etg.usf.edu/share/plagiarism/story.html>

*Turnitin* tutorial: [http://turnitin.com/en\\_us/training/student-training/submitting-a-paper](http://turnitin.com/en_us/training/student-training/submitting-a-paper)

**NOTE:** An institution may not release a paper to a plagiarism detection software without the student's prior consent unless all personally identifiable information has been removed, such as a student's name, social security number, student number, etc. Note that a paper/essay is considered an educational record and an institution may not ask a student to waive their rights under FERPA for the purpose of submitting papers to a plagiarism detection software.

Cheating Statement:	The USF College of Public Health expects students to maintain academic honesty in all courses. By virtue of being registered in a public health course, students agree to refrain from cheating. If cheating in any form (academic dishonesty) is detected, appropriate action will be taken. <a href="http://www.grad.usf.edu/inc/linked-files/USF_Grad_Catalog_2011-2012.pdf#page=39">http://www.grad.usf.edu/inc/linked-files/USF_Grad_Catalog_2011-2012.pdf#page=39</a>
Holidays & Religious Observance:	<a href="http://generalcounsel.usf.edu/policies-and-procedures/pdfs/policy-10-045.pdf">http://generalcounsel.usf.edu/policies-and-procedures/pdfs/policy-10-045.pdf</a>
Emergency Preparedness:	In the event of an emergency, it may be necessary for USF to suspend normal operations. During this time, USF may opt to continue delivery of instruction through methods that include but are not limited to: Canvas, Elluminate, Skype, and email messaging and/or an alternate schedule. It's the responsibility of the student to monitor Canvas site for each class for course specific communication, and the main USF, College, and department websites, emails, and MoBull messages for important general information.
Special Accommodation:	Students in need of academic accommodations for a disability may consult with the office of Services for Students with Disabilities to arrange appropriate accommodations. Students are required to give reasonable notice (typically 5 working days) prior to requesting an accommodation. Students with Disabilities Services: <a href="http://www.sds.usf.edu/">http://www.sds.usf.edu/</a> Students: <a href="http://www.sds.usf.edu/students.asp">http://www.sds.usf.edu/students.asp</a> Faculty: <a href="http://www.sds.usf.edu/faculty.asp">http://www.sds.usf.edu/faculty.asp</a>
Student Grievance Procedure:	Review USF Academic Grievance Policy at: <a href="http://generalcounsel.usf.edu/policies-and-procedures/pdfs/policy-10-002.pdf">http://generalcounsel.usf.edu/policies-and-procedures/pdfs/policy-10-002.pdf</a> Graduate: <a href="http://www.grad.usf.edu/inc/linked-files/USF_Grad_Catalog_2011-2012.pdf#page=48">http://www.grad.usf.edu/inc/linked-files/USF_Grad_Catalog_2011-2012.pdf#page=48</a> Student assistance is provided by Division of Student Affairs, Office of the Student Ombudsman: <a href="http://www.sa.usf.edu/ombudsman">http://www.sa.usf.edu/ombudsman</a>

## **RESOURCES FOR STUDENTS**

Library Resources:	USF Library Resources and Services: <a href="http://www.lib.usf.edu/">http://www.lib.usf.edu/</a> Shimberg Health Sciences Library: <a href="http://library.hsc.usf.edu/">http://library.hsc.usf.edu/</a> For Library Tutorials follow links under 'Instructional Service' section
Creating Citations & Using Refworks:	<a href="http://guides.lib.usf.edu/CitingSources">http://guides.lib.usf.edu/CitingSources</a>
Netiquette:	<a href="http://eta.health.usf.edu/publichealth/standards/syllabus/Online_Netiquette.pdf">http://eta.health.usf.edu/publichealth/standards/syllabus/Online_Netiquette.pdf</a> ( <i>online communication etiquette for online courses</i> )
USF Email:	<a href="http://health.usf.edu/publichealth/eta/pdf/MyUSF_Email.pdf">http://health.usf.edu/publichealth/eta/pdf/MyUSF_Email.pdf</a>
Canvas:	Tutorials: <a href="http://eta.health.usf.edu/publichealth/CanvasStudentTutorial/story.html">http://eta.health.usf.edu/publichealth/CanvasStudentTutorial/story.html</a>
Elluminate Live:	Tutorials: <a href="http://media.c21te.usf.edu/illuminatestudents.html">http://media.c21te.usf.edu/illuminatestudents.html</a> ( <i>for online courses</i> )

Thoughts for summer 2016:

Reorder lectures (bump up a week for most lectures)

More 4 P's to marketing section

Eliminate Marketing Research

Beef up social marketing and other pop health marketing (see Pop Health text, ch. 17 and ?)

Require both traditional and social marketing/disease management marketing approaches

Teach students how to give feedback

Grade a brief presentation for each student instead of the peer feedback

Add quizzes with short writing based on the lectures and/or text

Beef up channel marketing component of Strategic Approach

Increase the qualitative feedback portion of the Strategic and Marketing plans peer feedback form

In the case, add what the competitor's marketing message is so that the students can compare in the positioning statement in the Marketing plans.