

Course Plan

**Strategic Planning in Healthcare and HIT
(32 .638)**

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A graduate-level course introducing healthcare professionals to strategic planning for the information systems organization. The concepts are taught in a manner that allows the skills learned to be applied to any discipline with the organization.

Course Objective

To give healthcare professionals a practical understanding of strategic planning and its importance to a successful organization. Skills learned in this course will enable the student to work effectively with and support the information systems planning effort in order to ensure better IS and business alignment.

Textbooks

Two textbooks are required and necessary:

- 1) A Practical Guide to Information Systems Strategic Planning, Second Edition, Anita Cassidy, Auerbach Publications. 2005.
- 2) From Business Strategy to IT Action Right Decision for a Better Bottom Line. Robert J. Benson, Thomas L. Bugnitz and William B. Walton, John Wiley & Sons Inc, 2004.

Teaching Approach

The course is taught on a “blended” basis, including both face-to-face and online classes. The class meets face-to-face 6 times; it meets online 8 times using the Wimba Internet-based conferencing facility.

No background in information systems is required. The course will not involve any “hands on” computer work.

Face-to-Face Classes

The class meets face-to-face at Yankee Alliance in Andover from 5:30 pm to 8:30 pm on 6 Thursdays (see Class Calendar below: Face-to-Face classes are designated with a FTF in the meeting date column). You have assignments for each class, including the first:

- **Reading Assignments.** Reading assignments will be from either or both texts. The assigned reading is to be read before class as the material will be the basis for the evening’s topic and discussion.
- **Supplemental Reading Assignment.** Supplemental reading will be assigned to add additional dimension and perspective to the material in the lectures and text. The number of supplemental readings will vary each week, and these are available as PDF documents from the class web site, eJournal or the article packet.
- **Student Reports.** Students will be asked to research special topics related to strategic planning and, using PowerPoint, present their findings to the class.

The reading assignments are not optional. You will get so much more out of the course if you prepare adequately for our time together. I encourage you to read key assignments three times, preferably at different sittings. First, read the assignment quickly to get an overall perspective on what is covered and how the information is organized. Second, read the assignment slowly and carefully for comprehension. Third, quickly read the assignment once more, and highlight key points.

Online Classes

The class meets online from 7:30 pm to 9:00 pm on 8 Thursdays. You not only have reading assignments for these classes, but you also have Supplemental Research Assignments (see Class Calendar below). For each Online class, you will develop a PowerPoint presentation of your supplemental research findings, and post your PowerPoint presentation to the class web site no later than 4 pm on the day of class. During class itself, selected students will be asked to make their presentations.

Prior to the first class, you will receive information on accessing and using both Blackboard Learn. Technical support will be available to assist you in preparing your computer to use these features.

If you are not available to participate in one or more online classes, you must listen to the archived classes on your own schedule. The classes will be recorded and available from the class web site.

The online classes are conducted using Blackboard Chat, an Internet-based communications facility accessed through the course's web site. To use Blackboard Chat, you will need a computer microphone and head set. Due to feedback problems, the use of desktop speakers is not allowed.

Missed Classes

If you are not able to attend a class, you must complete the readings and review the posted lecture (and recorded lecture if an Online class was missed) on your own schedule and prepare a one-page report of what you learned for the next attended class.

Special Project Presentation

A special project is required as follows. Consider that you are a CIO leading a strategic planning effort for a healthcare organization. This is a new endeavor for the organization so you are developing the initial plan and supporting organizational teams from scratch. The project will have 3 components:

Project Scenario Describe the "real" or hypothetical work environment, organization business strategic plan, mission, vision, goals and current information systems configuration, as well as any known unmet needs or issues. The organization is expected to be in the **Healthcare industry**.

The report will consist of a minimum of 5 pages single spaced describing the organization, its plan and current IT Infrastructure. The report should address any external threats that will influence the development of the IT strategic plan.

IT Strategic Plan The student will submit a strategic plan based on the project scenario using the format discussed in class. The plan should not have more than 3-

5 strategic initiatives with concise critical success factors and measurements of success.

Presentation: The presentation will be a PowerPoint presentation developed as if it is being presented to the healthcare organization's Senior Management/Board of Directors. The presentation must include the following:

- ✓ slides addressing the project scenario
- ✓ one or more tables or graphical representations showing the SWOT and Gap Analysis performed
- ✓ One or more slides depicting the IT Infrastructure (can be graphical)
- ✓ 4-6 slides depicting the initiatives, critical success factors and measurements of success including explanation of business alignment
- ✓ 1 slide delineating the next steps for implementation

Students are strongly encouraged to come forward with their own project scenario ideas to secure approval. Otherwise, I am happy to sit down with you and suggest ideas.

Much of the information required for this assignment is available from the Web and industry trade journals (e.g., Modern Healthcare, Health Management Technology, CIO, SearchHealthIT.com). Although not required, you may also wish to interview one or more individuals with relevant experience and expertise.

Anyone using "real" information should "blind" his or her presentation such that institutional confidentiality is protected.

During the last classes, you will have 20 minutes to present your project to the class. Students are expected to participate and ask questions of the presenter.

Grading

Grades will be assigned using the following weights:

25%-- Class Participation/Attendance

30%-- Class Assignments

45%--Special Project Presentation

If you miss more than one Face-to-Face class, your grade for the entire course will be reduced.

I will grade each assignment using a 100-point scale. Up to Five points of "extra credit" will be available to anyone providing unusually expansive and well-researched PowerPoint presentations. No points will be given for late submittals. All assignments are due at 4 pm on the day of class itself.

Grading will follow the following scheme:

Grade	GPA Equivalent	Numeric Range		Grade	GPA Equivalent	Numeric Range
A	4.0	93-100		C	2.0	73-76
A-	3.7	90-92		C-	1.7	70-72
B+	3.3	87-89		D+	1.3	65-69
B	3.0	83-86		D	1.0	60-64
B-	2.7	80-82		F	0.0	>60
C+	2.3	77-79				

Academic Integrity

There is a University policy regarding academic integrity. For details, see UMass Lowell Undergraduate Catalog.

http://www.uml.edu/catalog/undergraduate/policies/academic_dishonesty.htm.

It is your responsibility to review and understand this policy.

Class Calendar

Class Date	Topic	Cassidy Reading Assignment	Benson Reading Assignment	Supplemental Reading Assignment	Student Reports
FTF 1/23	<p>Introductions</p> <p>Course Expectations</p> <p>Why is Planning Important?</p> <p>Purpose of Business Strategic Planning and the relationship of IT planning to the business process</p>	Ch. 1: Purpose of Information Systems Strategic Planning	Ch 1: Define the Goals	The Real Value of Strategic Planning	Internet Review and report of Purpose for Strategic Planning
1/30	IS governance structures supporting the planning process	Ch. 2: IS Governance		Creating the Strategic Plan for Today's IT	Compare and contrast various IS Organizational Structures: what are the strengths/weaknesses of the different structures
2/6	IT Strategic Planning Process overview	Ch 3: The Planning Process	Ch 2: Ask the Right Questions	What will it take? Exploiting trends in Strategic Planning to Prepare for Reform	Internet review: Report on successful IT Strategic Plans....What did they do to be successful?
FTF 2/13	<p>Initiating a Strategic Planning Process</p> <p>Business Needs Analysis</p> <p>Assessing the Areas of Strategic Impact for IS</p>	Ch 4: The Visioning Phase	Ch 3: Connect to the Bottom Line	HIT Implementation in Critical Access Hospitals: Extent of Implementation and Business Strategies Supporting IT Use	<p>Research and report on the Use of Gap Analysis</p> <p>Project Scenarios Due</p>

2/20	<p>Performing and Documenting an IS environmental overview</p> <p>Analyzing the current state of IS infrastructure and its applicability to meeting the business strategic goals</p>	Ch 5: The Analysis Phase	Ch 5: Focus on the Right Things	The Core Competence	Internet Review on the use of SWOT Analysis in Strategic Plan preparation
2/27	<p>Development of an IS Strategic Vision, Mission and values</p> <p>Development of IS goals and Strategies</p> <p>Confirmation of Business/Clinical Alignment</p>	Ch 6: The Direction Phase		Competing Values in Healthcare: Balancing the (Un)Balanced Scorecard	Article review and report on importance of IT strategic alignment to Healthcare Organizations Vision, Mission or organizational values.
3/13	<p>Develop IS Strategic Plan Measurements of Success</p> <p>Evaluation of Critical Success Factors</p> <p>Development of a Balanced Score Card</p>		Ch 10 Keep Score	Using the Balanced Scorecard as a Strategic Management System	Report on Balances Score Cards and how they are used in the clinical environment
FTF 3/20	<p>Development of a Road Map</p> <p>Development of a Communication Plan</p> <p>Plan Finalization</p>	Ch 7: The Recommendation Phase	Ch 12: Chart the Path to Implementation	IT Strategy Maps: A Tool for Strategic Alignment	Research and report on how IT effectively (or disastrously) implements communication plans within healthcare organizations

3/27	IT Portfolio Management Plan costing balancing Costs and resources Strategic Planning in Healthcare: A look at the differences and similarities	Ch. 8: Next Steps	Ch 4: Understand Costs and resources	Using business intelligence for competitive advantage	Research and report on how financial concerns (IT budgets) effect strategic planning in HIT
FTF 4/3	Interrelationship of Project Planning and the Strategic Plan		Ch 13: Define What's Next	Activation and Operational Planning: Ensuring a Successful Transition	Research articles on Healthcare Strategic Planning. Compare and contrast the similarities and differences to non healthcare planning
4/10	Strategic Plan renewal Dealing with external forces and integrating change into the plan		Ch 14: Answer the "So What?" Question	The Fall and Rise of Strategic Planning	Research the role of the CIO in the strategic planning process.
4/17	Dealing with the Corporate Culture Gaining Acceptance for Strategic Planning		Ch 11: Deal with Culture	HBR collaboration and performance collection READ ONLY – Turning Great Strategy into Great Performance	Research and report on strategic planning and the impact of culture on the effectiveness of implementation within a clinical environment
FTF 4/24					Strategic Plan Presentations
FTF 5/1					Strategic Plan Presentations