PHW224: Organizational Behavior and Management in Health Care
Course Syllabus (Fall 2017)

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Learning Objectives:

Internalize the diverse roles of leaders and managers in fostering an organizational culture that prioritizes learning and fosters collaboration

Organizational Culture

Human Resources Management

Team Effectiveness- Real Team

Team Effectiveness- Compelling Direction, Enabling Structure and Supportive Context

Week 4: Midterm Exam Week (9/11-9/17)

Week 5 (9/18-9/24). - Leadership and Organizational Change in Health Care Delivery Organizations

Learning Objectives:

Leadership in Health Care Organizations

Leadership and Organizational Change

Performance Improvement Methods- Foundations

Post feedback to another team’s charter.

Recommended Supplemental Readings:

Week 6 (9/25-10/1). Performance Improvement Methods and Value in Health Care Delivery

Learning Objectives:

Performance Improvement Methods- Foundations

Performance Improvement Methods- Stakeholder Engagement and Transparency

Week 7 (10/2-10/8). – Operational Efficiency, Innovation Diffusion, and Team PI Video

Learning Objectives:

Operational Efficiency and Performance Improvement

Diffusion of Innovation in Health Care

Finals (Video) Week (10/9-10/15). – Video Assignment and Teamwork Reflection

Learning Objectives:

The External Environment and Initiative Fatigue in Health Care

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Course Description

A solid understanding of organizational behavior is critical for the effective management of the complex demands and arrangements in health care and public health organizations. The main objective of this course is to introduce students to the active theories and perspectives in management and organizational theory using a case-based and applied approach. By the end of this course, students will have a solid comprehension of a diverse set of frameworks and theories relevant to leading and managing health care organizations.

Course Learning Objectives and Assessment Methods

The course is designed to help students achieve the following LEARNING OBJECTIVES:

<table>
<thead>
<tr>
<th>Learning Objective</th>
<th>Assessment Method</th>
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</thead>
<tbody>
<tr>
<td>Illustrate how organizational boundaries are defined based on transaction-cost economics.</td>
<td>Vertical Integration Discussion Post</td>
</tr>
<tr>
<td>Analyze the determinants of “make or buy” decisions in healthcare.</td>
<td>Baystate Consolidation Case Analysis and Discussion Post</td>
</tr>
<tr>
<td>To become familiar with your assigned teammates and to develop norms of conduct for your team.</td>
<td>Organizational Learning Icebreaker Discussion Post</td>
</tr>
<tr>
<td>To describe the tradeoffs of divisional, functional, and matrix organizational designs.</td>
<td>Matrix Management Case Analysis Submission</td>
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<tr>
<td>To develop strategies for the effective recruitment, engagement, and integration of effective governing boards.</td>
<td>The Day After Case Discussion Post</td>
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<tr>
<td>To analyze the foundational requirements of organizational learning, including psychological safety, openness to new ideas, and experimentation.</td>
<td>Organizational Learning Survey and Analysis Submission</td>
</tr>
<tr>
<td>Internalize the diverse roles of leaders and managers in fostering an organizational culture that prioritizes learning and fosters collaboration.</td>
<td>Learning from Failure Discussion Post</td>
</tr>
<tr>
<td>Internalize the diverse roles of leaders and managers in fostering an organizational culture that prioritizes learning and fosters collaboration.</td>
<td>Organizational Culture Discussion Post</td>
</tr>
<tr>
<td>Internalize how health care delivery managers and leaders can effectively address human resource management issues.</td>
<td>Jenner Situation and “What a Star, What a Jerk” Case Analysis Submission</td>
</tr>
<tr>
<td>Internalize how health care delivery managers and leaders can design and facilitate high performing teams.</td>
<td>Motivation and Financial Incentives Discussion Post</td>
</tr>
<tr>
<td>To assess student learning of the core concepts from the first three weeks of course.</td>
<td>Proctored Midterm Exam on Team Effectiveness</td>
</tr>
<tr>
<td>Identify critical stakeholders for the planning, implementation, and evaluation of health care programs, policies, and interventions. Evaluate the barriers and facilitators of organizational change in health care delivery organizations.</td>
<td>VA Case Analysis Submission</td>
</tr>
<tr>
<td>Illustrate the main steps involved in change management and special considerations in health care delivery settings.</td>
<td>Leadership and Change Discussion Post</td>
</tr>
<tr>
<td>Integrate leadership and change management theories and describe how these theories can be applied to managing health care organizations.</td>
<td>Initiative Fatigue Discussion Post</td>
</tr>
<tr>
<td>Illustrate and use performance improvement methods Describe the tasks necessary to assure that program implementation occurs as intended.</td>
<td>Cincinnati Children’s Hospital Case Submission</td>
</tr>
<tr>
<td>Highlight the key organizational performance issues in health care management. Apply quality and performance improvement concepts to address organizational performance issues.</td>
<td>Performance Improvement Discussion Post</td>
</tr>
<tr>
<td>Analyze the ways in which diffusion of innovation theory applies to spreading innovations and evidence-based care.</td>
<td>Virginia Mason Case Discussion Post</td>
</tr>
<tr>
<td>Demonstrate team building, negotiation, and conflict management skills (through a team case video).</td>
<td>Performance Improvement Strategy Video Team Assignment</td>
</tr>
<tr>
<td>Critical reflection of enabling conditions for effective teams, including real team, compelling direction, enabling structure, supportive context, and expert coaching</td>
<td>Teamwork Survey and Reflection Submission</td>
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</table>
**Instructor Information**

<table>
<thead>
<tr>
<th>Hector P. Rodriguez, PhD, MPH</th>
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<tbody>
<tr>
<td>Professor of Health Policy and Management</td>
</tr>
<tr>
<td>University of California, Berkeley</td>
</tr>
<tr>
<td>Office Hours: Saturday, 9:30am-10:30am Pacific and by appointment: hrod.youcanbook.me</td>
</tr>
<tr>
<td>Email: <a href="mailto:hrod@berkeley.edu">hrod@berkeley.edu</a></td>
</tr>
</tbody>
</table>

Dr. Hector P. Rodriguez is the Henry J. Kaiser Endowed Chair in Organized Health Systems, Professor of Health Policy and Management, co-director of the Center for Healthcare Organizational and Innovation Research (CHOIR), and chair of the Ph.D. Program in Health Policy at the UC Berkeley School of Public Health. His expertise is in organizational analysis and performance measurement in health care delivery and local public health systems. He has published extensively on the measurement of patient care experiences and the impact of delivery system interventions on patient outcomes, including the impact of performance-based financial incentives on primary care quality. Dr. Rodriguez is a board member of the American Medical Group Association Foundation and the Davita Healthcare Partners Institute for Applied Research and Education. Prior to his academic career, he was a management consultant for The Permanente Medical Group where he worked with leaders and clinicians in Northern California to implement primary care practice redesign and evaluate their impact on patient care. He received is BA in Urban Studies and Planning from UC San Diego, MPH in Health Policy and Administration from UC Berkeley, and PhD in Health Policy/ Medical Sociology from Harvard University. He is the 2011 recipient of the Association of University Programs in Health Administration’s Prize for Young Investigators.

<table>
<thead>
<tr>
<th>John Myovich, MBA</th>
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</thead>
<tbody>
<tr>
<td>Lecturer, Division of Health Policy and Management</td>
</tr>
<tr>
<td>Email: <a href="mailto:john_myovich@berkeley.edu">john_myovich@berkeley.edu</a></td>
</tr>
</tbody>
</table>

John Myovich is Lecturer at the UC Berkeley School of Public Health and former Director of Performance Excellence at Kaiser Permanente Northern California. He is an expert in performance improvement, financial analysis, strategy and planning. He has led several major initiatives in the area of performance management, hospital efficiency, quality, continuum of care, service delivery planning as well as technology implementations (electronic medical record). Throughout his career, he has taught a variety of healthcare and finance classes in Kaiser Permanente and externally at the International Business College, San Francisco and UC Berkeley, Haas School of Business. He received a BA in Biology from UC Berkeley, MBA in Finance from California State University, East Bay and Executive Leadership Program degree from the University of North Carolina, Kenan-Flagler Business School.
Jung Kim, MPH
Graduate Student Instructor
Email: jgkay@berkeley.edu

Jung is a PhD student of UC Berkeley’s Health Policy program and CHOIR, with a concentration in Organizations and Management. He has a Masters in Public Health from UC Berkeley’s On-campus/Online Professional Master of Public Health program, a Bachelor of Science in Public Health and Korean Studies from the University of Washington, and is board-certified in Public Health (CPH). He is an Executive Curriculum lead for the Kaiser Permanente School of Medicine and a Clinical Teaching Associate at the University of Washington School of Medicine. His professional interests are with primary care medical education outcomes research in health services and health systems-based curriculum across the medical education continuum.

Jessica Poon
Graduate Student Instructor
Email: jessicapoon@berkeley.edu

Jessica is a PhD student in the organizations and management track of the health policy program at the University of California, Berkeley. Between her current work with CHOIR and her BA in biology and philosophy also from Berkeley, she was at Memorial Sloan Kettering Cancer Center in New York where she studied screening and treatment decisions and led a team in designing and implementing a quality assurance program for the Department of Surgery. Her research is focused on medical decision-making, communication and education, both within and outside of the clinic setting.

Jessica Watterson, MPH
Graduate Student Instructor
Email: jwatterson@berkeley.edu

Jessica is a PhD student in the Health Policy PhD program at UC Berkeley in the organizations and management track. She received her undergraduate degree in Biochemistry from New York University and went on to earn an MPH from UC Berkeley. She was previously a Fulbright-Clinton Public Policy Fellow at the Ministry of Health in Samoa, studying mobile phone reminders and education for maternal health. Jessica also previously worked for the World Health Organization, Doctors Without Borders and Oxfam. Jessica’s research is focused on the evaluation of mobile health tools and other innovations, both domestically and abroad. She brings this interest to CHOIR, where she is working on a study to evaluate the implementation of a text-messaging program for diabetic patients.
Course Format

PHW24 is an online introductory course in health care organizational behavior and management.

Required Course Materials

Microphone/headset for your computer

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<th>Course</th>
<th>ISBN</th>
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The OOMPH Program has purchased access to Harvard Business Publishing cases for you (Links to an external site).


Readings, Videos and Resources

The required audio lectures, including transcripts with PowerPoint slides, the required course readings, and the required videos will be available on the course site for you to download. A course reader for each week in pdf format which includes video transcripts and 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.

Course Schedule

Week 1 (8/21-8/27) - Organizational Behavior in Healthcare Delivery Organizations

Learning Objectives:
- Describe rational, natural, and open systems approaches to understanding organizational behavior
- Analyze the considerations for services and organizational integration in a health delivery care delivery system.
- Develop a team identity and agree on a set of core norms of conduct

Course Introduction

1. Review video introduction to the course and team assignment by Professor Rodriguez and John Myovich

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2. Post a video to introduce yourself to your discussion group.

**Introduction to Organizational Behavior and Transaction Cost Economics**

3. Participate in the live Course Introduction with instructors Hector Rodriguez and John Myovich on Monday, **August 21, 2017 at 5:30pm PST.**
5. Read Week 1 Handouts, pay attention to the transaction cost content for the discussion post
6. Submit bCourses discussion post on Transaction Costs and Vertical Integration by Saturday.
7. Make a substantive comment on at least one student’s discussion post by Monday night.

**Organizational Integration and Management**

8. Read Olden Text, Chapter 2 on “Management”
9. Read [HBS case: Baystate Integration Case.](#)
10. Review Point and Counterpoint for Baystate Integration case.
11. Respond to case questions posed at the end of the case and submit your responses via bcourses.
12. Submit bCourses discussion post about the Baystate case by Saturday.
13. Make a substantive comment on at least one student’s discussion post by Monday night.

**Final Team Video Project Week 1 Milestone**

16. Team Norming Exercise: Schedule a meeting during Week 2 for a synchronous discussion with your team members (3-4 of your classmates) to clarify your team’s assignment and norms of conduct. Use Google Hangout or any web conferencing software of your choice for your team meetings.
17. Each team member complete Step 1 - Team Norms of Conduct and post via [Google Doc Workbook](#).

**Week 2 (8/28-9/3) - Organizational Design, Governance, and Organizational Learning**

**Learning Objectives:**

- To describe the tradeoffs of divisional, functional, and matrix organizational designs.
- To identify the elements of effective governing boards.
- To analyze the foundational requirements for organizational learning, including psychological safety, openness to new ideas, and experimentation.

**Organizational Design**

1. Review Organization Design Lecture
2. Read Olden, Chapter 5 on organizational design.
3. Read “Matrix Management for Your Accountable Care Organization?”
4. Respond to two questions and draw an organizational chart based on the Matrix Management scenario and

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paste into your Team Video Project’s Google Doc Workbook. Organizational charts can be developed using any software, but we recommend using Powerpoint or Microsoft Word.

**Governance in Health Care**
5. Review Governance Lecture
6. Read case: The Day After.
7. Review Point Counterpoint video on “The Day After”
8. Submit bCourses discussion post for the “Day After” case by Saturday.
9. Make a substantive comment on at least one student’s discussion post by Tuesday night (after Labor Day).

**Scientific Management in Health Care**
10. Review video on Scientific Management (Taylorism on ABC World Report).
12. Submit bCourses discussion post about Scientific Management and Taylorism by Saturday.
13. Make a substantive comment on at least one student’s discussion post by Tuesday night (after Labor Day).

**Organizational Learning**
15. Complete Organizational Learning Assignment and submit via bCourses.
16. (Optional) Participate in Enrichment Presentation and Discussion “Organizational Learning in Medical Education” by Jung Kim, MPH
18. Submit bCourses discussion post in response to the “Learning from Failure” concept by Saturday.
19. Make a substantive comment on at least one student’s discussion post by Tuesday night (after Labor Day).

**Final Team Video Project Week 2 Milestone**
20. Review Team Video Presentation Guidelines (here in the syllabus and in your team’s google doc workbook).
   For more information about ACOs, see ACO Research at UC Berkeley and American Hospital Association’s ACO Survey Results.
21. Conduct a kick-off meeting with your assigned team members to discuss your team's assignment and norms of conduct (Step 1 from Week 1). Discuss project and clarify individual member roles among teammates. Also be sure to decide on the following:
   1) Based on your individually submitted ACO organizational charts, collectively determine your ACO’s organizational design and begin to draw your team’s ACO organization chart (to be submitted in Week 3). Make sure to specify which services and specialties are included, especially as they relate to your assigned team case (e.g., endocrinology, ophthalmology, mental health/psychiatry, cardiology, gastroenterology, etc.), and
   2) Determine your organization’s health information technological capabilities related to referral processes (for example, what can your electronic health record do, what care management programs do you have
within your integrated group vs. IPA practices?). **Submit your responses via Google Doc Workbook.**

**Week 3 (9/4-9/10). – Organizational Culture, Team Performance, and Human Resources Management**

**Learning Objectives:**
- Internalize the diverse roles of leaders and managers in fostering an organizational culture that prioritizes learning and fosters collaboration.
- Analyze the five enabling conditions of team effectiveness - a real team, a compelling direction, enabling structure, supportive context, and expert coaching.
- Internalize how health care delivery managers and leaders can design and facilitate high performing teams and effectively address human resource management issues.

**Organizational Culture**
1. Review Rodriguez video post- “Organizational Culture”.
2. View Southwest Airlines videos and links, then submit bCourses discussion post in response to the questions by Saturday.
3. Make a substantive comment on at least one student’s discussion post by Monday night.

**Human Resources Management**
4. Read Olden, Chapter 4 (Organizing: Jobs, Positions, and Departments)
5. Olden, Chapter 8 (Staffing: Retaining Employees)
8. Read Cases: The Jenner Situation and “What a Star, What a Jerk”
9. Respond to the Jenner Situation and What a Star, What a Jerk case questions and submit via bCourses
10. (Optional) Participate in Enrichment Presentation and Discussion “Interest Based Problem Solving for Improving Labor Relations” by Professor Rodriguez

**Team Effectiveness- Real Team**
12. Read Hackman, Chapters 1-3.
13. Review “Outpatient Team Huddles” Example Video.

**Team Effectiveness- Compelling Direction, Enabling Structure and Supportive Context**
15. Read Hackman, Chapter 4-6.
16. Review audio note on “Virtual teams”.

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17. View video on “Motivation and Financial Incentives”.
18. Submit bCourses discussion post about Team Incentives by Saturday.
19. Make a substantive comment on at least one student’s discussion post by Monday night.

Final Team Video Project Week 3 Milestone
18. Submit your team’s ACO organizational chart via your team’s Google Doc Workbook after discussing and finalizing with your teammates.

Week 4: Midterm Exam Week (9/11-9/17)

1. Read Hackman, Chapters 7-8 (not required for the midterm, but is a good reinforcement)
2. Proctored midterm exam: Team performance case study and written exam (16 points)
   b. Answer questions about improving the enabling conditions for team effectiveness as they relate the case (questions posted on Midterm module in bCourses).
3. Complete the mid-course Evaluation and provide feedback to instructors. Link will be distributed on bCourses.

Final Team Video Project Week 4 Milestones
4. Review Camtasia guidance posted on the bCourses and create a practice video with your team. Post the video link to your team’s Google Doc Workbook.
5. Review Lecture on Project Charter and Improvement. Review your performance “run chart” data. Based on the data trends for your IPA vs. integrated group practice sites, collectively determine performance improvement measures and targets with your teammates. Write a SMART goal. Submit each of these in your Google Doc Workbook.
6. Recommended: Read Performance Improvement Handouts to prepare for Week 5

Week 5 (9/18-9/24). - Leadership and Organizational Change in Health Care Delivery Organizations

Learning Objectives:
- Illustrate the main steps involved in change management and special considerations in health care delivery settings.
- Identify critical stakeholders for the planning, implementation, and evaluation of health programs, policies, and interventions.
- Integrate leadership and change management theories and describe implications for health care delivery organizations.
- Evaluate the barriers and facilitators of organizational change in health care delivery organizations.

Leadership in Health Care Organizations

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1. Read Week 4 Handouts.
2. Review video “The Biggest Mistake a Leader can Make”.
3. Read Olden, Chapters 9 on Leading: Theories and Models
5. Review John Kotter video interview on “Resistance to Change”
6. Submit bCourses discussion post on Leadership and Change by Saturday.
7. Make a substantive comment on at least one student’s discussion post by Monday night.

**Leadership and Organizational Change**
8. Review Lecture on Leadership and Change Management
9. Review Don Berwick video on leadership.
10. Read Olden, Chapter 14 (Managing Change)
11. Read Case: Turnaround at the Veterans Health Administration (VHA).
12. Review Point Counterpoint video on Turnaround at the Veterans Health Administration
13. Respond to the VHA Case questions via bCourses.

**Performance Improvement Methods- Foundations**
13. Review Myovich Lecture on Performance Improvement Methods
14. Read Performance Improvement Handouts
15. (Optional) Participate in Enrichment Presentation and Discussion “PI Tools in Action” by John Myovich

**Final Team Video Project Week 5 Milestone**
16. Complete your Project Charter (including specific performance measures, including a balancing measure) in your Google Doc Workbook and post it on the discussion forum.
17. Post feedback to another team’s charter on the discussion board.

**Recommended Supplemental Readings:**
- Olden, Ch 10 (Leading: Motivating and Influencing) and Ch 11 (Leading: Culture and Ethics)

**Week 6 (9/25-10/1). Performance Improvement Methods and Value in Health Care Delivery**

**Learning Objectives:**
- Illustrate and use performance improvement methods
- Apply quality and performance improvement concepts to address organizational performance issues
- Describe the tasks necessary to ensure that program implementation occurs as intended.

**Performance Improvement Methods- Foundations**

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1. Review Myovich Lecture on Testing and Implementation
2. Read Olden, Chapter 12: Controlling and Improving Performance
3. Review video on “UC Berkeley MPH Alumni Experiences of Performance Improvement”
4. Submit bCourses discussion post about Performance Improvement by Saturday.
5. Make a substantive comment on at least one student’s discussion post by Monday night.

**Performance Improvement Methods- Stakeholder Engagement and Transparency**
6. Review Video “I've Been a Patient Since I was Born”
7. Read Case: Cincinnati Children’s Hospital Medical Center.
8. Review Point and CounterPoint Video for CCHMC case.
9. Respond to the CCHMC case questions and submit via bCourses.
10. (Optional) Participate in Enrichment Presentation and Discussion “Patient Safety and Engagement” by Jessica Poon and Jessica Watterson.

**Final Team Video Project Week 6 Milestone**
11. Describe the set of improvement opportunities or solutions your team has developed for testing. Update your team’s Google Doc workbook.
12. Describe how your team will assess the implementation climate of your practices to determine whether or not (and which) practices are “ready” for implementing changes required of an electronic referral and consultation system. Your assessment should use PI tools presented in the course to inform the rollout of your improvement effort. Update your team’s Google Doc workbook using information from this exercise.

**Recommended Supplemental Readings:**
- Benneyan, J.C., Lloyd R.C., Plsek, P.E - Statistical Process Control as a Tool for Research and HealthCare Improvement, Quality Safety Health Care 2003

**Week 7 (10/2-10/8). – Operational Efficiency, Innovation Diffusion, and Team PI Video**

**Learning Objectives:**
- Analyze the ways in which diffusion of innovation theory applies to spreading innovations and evidence-based care.
- Highlight the key organizational performance issues in health care management
- Demonstrate team building, negotiation, and conflict management skills (through a team case video).

**Operational Efficiency and Performance Improvement**
1. Review TED Talk on: Go to the Gemba
2. Read Case: Virginia Mason Medical Center.
4. Review Point Counter Point video for Virginia Mason Medical Center
5. Review news article on: Virginia Mason Investigation.
6. Submit bCourses discussion post in response to the Virginia Mason Case by Saturday.
7. Make a substantive comment on at least one student’s discussion post by Monday night.

Diffusion of Innovation in Health Care
8. Review Lecture on Diffusion of Innovations
9. Read Diffusion Handouts.
11. Submit bCourses discussion post about diffusion of innovations by Saturday.
12. Make a substantive comment on at least one student’s discussion post by Monday night.

Final Team Video Project Submission to instructors
13. Complete and submit your team’s final team video assignment using Camtasia, paste a link to it in your team’s Google Doc workbook, and post to the discussion board so other students can comment and ask questions.

Finals (Video) Week (10/9-10/15). – Video Assignment and Teamwork Reflection

Learning Objectives:
● Understand theories relevant to understanding how health care organizations adapt to their external environmental.
● Critical reflection of enabling conditions for effective teams, including real team, compelling direction, enabling structure, supportive context, and expert coaching

The External Environment and Initiative Fatigue in Health Care
1. Review Rodriguez video lecture on the “external environment”
2. Review Point Counterpoint video note on “preventing initiative fatigue in health care delivery organizations”
3. Submit bCourses discussion post on initiative fatigue in health care by Saturday.
4. Make a substantive comment on at least one student’s discussion post by Monday night.

Team PI Video Feedback and Teamwork Assessment
5. Each individual is responsible for reviewing two other team’s videos on your discussion board and posting a critical comment and/or posing a question for each of the two teams.
6. Team Assessment and Reflection. Complete a confidential web-based team assessment. The survey provides an opportunity for you to reflect on your team’s functioning and effectiveness. Please be honest when completing the survey- your responses will NOT affect your grade. Next, answer some reflection questions and submit via bCourses - this portion of the assignment will be graded.
6. Complete final course evaluation. Link will be distributed on bCourses.
Additional references from lecture:

- Patient Centered Medical Home (Links to an external site.)
- EHR "Meaningful Use" (Links to an external site.)
- Example Provider Report Card for Santa Clara County (Links to an external site.)

Additional reference from Point Counterpoint: IHI Collaboratives (Links to an external site.)

Course Grading (Points Distribution)

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<thead>
<tr>
<th>Assignment</th>
<th>Week</th>
<th>Points</th>
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<tbody>
<tr>
<td>Student Introduction Video Post</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>“Transaction Cost and Vertical Integration” Discussion Post</td>
<td>1</td>
<td>2</td>
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<tr>
<td>Bay State Integration Case Analysis</td>
<td>1</td>
<td>5</td>
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<tr>
<td>Bay State Analysis- Discussion Post</td>
<td>1</td>
<td>2</td>
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<tr>
<td>Team Video Project: Norms of Conduct</td>
<td>1</td>
<td>1</td>
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<tr>
<td>Matrix Management: Individual Org Chart</td>
<td>2</td>
<td>2</td>
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<tr>
<td>The Day After Case Discussion Post</td>
<td>2</td>
<td>2</td>
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<tr>
<td>Scientific Management and Taylorism Discussion Post</td>
<td>2</td>
<td>2</td>
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<tr>
<td>Organizational Learning Assignment</td>
<td>2</td>
<td>5</td>
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<tr>
<td>Learning from Failure Discussion Post</td>
<td>2</td>
<td>2</td>
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<tr>
<td>Team Video Project: ACO Org Chart</td>
<td>3</td>
<td>3</td>
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<tr>
<td>Organizational Culture (Southwest) Discussion Post</td>
<td>3</td>
<td>2</td>
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<tr>
<td>Jenner Situation and Star/Jerk Case Analysis Submission</td>
<td>3</td>
<td>5</td>
</tr>
<tr>
<td>Motivation and Financial Incentives Discussion Post</td>
<td>3</td>
<td>2</td>
</tr>
<tr>
<td>Proctored Midterm Exam on Team Effectiveness</td>
<td>Midterm (4)</td>
<td>16</td>
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<tr>
<td>Team Video Project: SMART goal and PI targets</td>
<td>Midterm (4)</td>
<td>1</td>
</tr>
<tr>
<td>Team Video Project: Create Camtasia test video</td>
<td>Midterm (4)</td>
<td>1</td>
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<tr>
<td>Leadership and Change Discussion Post</td>
<td>5</td>
<td>2</td>
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<tr>
<td>VA Case Analysis Submission</td>
<td>5</td>
<td>5</td>
</tr>
<tr>
<td>Team Video Project: Project Charter</td>
<td>5</td>
<td>3</td>
</tr>
</tbody>
</table>
Performance Improvement Discussion Post  | 6  | 2  
Cincinnati Children's Hospital Case Submission | 6  | 5  
Team Video Project: Readiness for Implementation | 6  | 2  
Virginia Mason Case Discussion Post | 7  | 2  
Diffusions of Innovations Discussion Post | 7  | 2  
Team Video Project: Submit Performance Improvement Strategy Video | 7  | 16  
Initiative Fatigue in Health Care Performance Improvement Post | Final (8) | 2  
Teamwork Survey and Reflection Submission | Final (8) | 5  
**TOTAL** | - | 100  

**Note:** All assignments and final post responses are due by Monday 11:59pm PST.

### Course Requirements

#### 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 team project activities.

#### Participation in Course Activities and Discussions

Participation in the course is measured through active participation (original posting and responses) on the bCourse’s discussion board. Discussion posts are worth 2 points and graded using the following rubric:

<table>
<thead>
<tr>
<th>Points</th>
<th>Criteria</th>
<th>Student Effort</th>
</tr>
</thead>
<tbody>
<tr>
<td>0 points</td>
<td>Did not participate</td>
<td>Did not post online for both initial and follow-up post</td>
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<tr>
<td>1 point</td>
<td>Insufficient</td>
<td>Did not post follow-up post; Activity was minimal, echo-type responses, inaccurate, irrelevant, or incomplete contributions</td>
</tr>
<tr>
<td>2 points</td>
<td>Competent</td>
<td>Content relevant and accurate; Contributed effectively with new ideas; engaged in a substantive conversation; demonstrates ability to apply, analyze, synthesize course material</td>
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### Instructions for Team Video Assignment (also in your Google Doc Workbook)
There will be one major team activity (the final video assignment due in Week 7) worth 16 points. Each week, milestones are set as building blocks to complete your final video and to receive instructor feedback. Please see bcourses to find a Google Doc Workbook for your respective team.

To record the team video, please see the Google Hangout guidance on the course website for instructions on how to use the application. If you and your teammates have questions about the team video production, please contact your assigned graduate student instructor.

- You are the executive management team of a large ACO in Northern California with low performance on your assigned quality indicator.
- Your ACO’s organizational structure includes both an integrated group practice model and an independent practice association model.
- Physicians in integrated group physicians are employed by a large medical group and the ACO and medical group work together on facilities management and improvement initiatives as well as performance improvement priorities. In contract IPA physicians own and operate their own facilities, but do coordinate with the ACO and integrated medical group on high priority quality improvement initiatives such as the one your team is engaged in.
- Of your 850,000 adult patients, 60% are established with primary care physicians of your IPA practices and 40% are established with PCPs of your integrated group practices.
- You have 35 integrated group practice sites with a total of 350 adult primary care physicians and 200 specialists. Larger sites have a broader range of specialties than smaller sites. Your IPA physicians belong to multiple IPAs and you contract with 345 IPA physicians at 290 independent practice sites.
- Approximately 40% of your IPA practices have more than half (50%) of their patients attributed to your ACO. The other 60% of IPA practice sites have much lower proportions of patients from your organization. In other words, they have demands from other networks they belong to that make your change plan difficult because you have less influence over their operations.

For your team’s presentation, review your run chart and Pareto chart data. please be sure to address the following as you present:

1. Describe how you will “diagnose” readiness for change across your IPA and integrated group practices? How does information about readiness inform your approach to implementing changes to improve performance?
2. What concrete actions would you take to improve performance on your assigned quality of care measure (think “Change Management”)?
3. Present your project charter for your operational change / improvement effort. Include a preliminary SMART goal. A SMART goal is a single statement that explains exactly what you are striving to achieve with your project. It is ...
   a. Specific – clearly says what will be improved, without operational definitions or acronyms
   b. Measurable – states current performance and desired performance
   c. Attainable – the team working on it believes it can be done
   d. Reflects the Customer’s Perspective – represents what the customer wants
   e. Time Bound – by what date the goal will be reached
4. Summarize the operational changes that will be required and your proposed timeline and request for resources and other instrumental support from your board of directors.
5. Present the performance improvement tools you would use in your PI journey?. Examples include:

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- Tools for data monitoring/representation
  - Check-sheets
  - Run / Control Charts
  - Histograms
  - Scatterplot
- Analysis
  - Cause and effect diagram (Fishbone Diagram)
  - Identify Best Practice Sites
  - Root Cause / Failure Mode and Effects Analysis (FMEA)
  - Pareto Chart
  - Priority Matrix
  - Stacey diagram

6. Describe implementation barriers you anticipate and your plans for addressing them.
7. Describe your team’s approach to obtaining the voice of the customer and how this information will inform your approach to implementing adaptations to your improvement approach.

### Project Charter Template:

<table>
<thead>
<tr>
<th>Project Name</th>
<th>Charter Date</th>
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<tr>
<th>Improvement Advisor Team</th>
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<table>
<thead>
<tr>
<th>Problem Statement and Business Case</th>
<th>Project Team</th>
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<tbody>
<tr>
<td>Problem Statement</td>
<td>● Sponsors:</td>
</tr>
<tr>
<td>Customer Benefit</td>
<td>● Champions:</td>
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<tr>
<td>Expected Financial Impact (Short and Long Term)</td>
<td>● Project Co-Leaders (Process owners):</td>
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<td>● Frontline:</td>
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<td>● Project Oversight:</td>
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<th>Project Measures</th>
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<tr>
<td></td>
<td>● Outcome Measures</td>
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<td>● Process Measures</td>
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<td>● Balancing Measures</td>
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<td>In-scope</td>
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<td>As Needed</td>
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<td>Out of Scope</td>
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**Proctored Midterm Exam**

There is no final examination for the course. **Proctored midterm exam**: Team performance case study and written exam (16 points): Read **Lynn J, Goldstein NE. Advance care planning for fatal chronic illness: avoiding commonplace errors and unwarranted suffering. Ann Intern Med. 2003;138(10):812-818** Answer questions about improving the enabling conditions for team effectiveness as they relate the case. Dates of proctored midterm and on campus proctored midterm are posted on the OOMPH Student Hub Academic Calendar in bCourses.

**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.

**Announcements**

Announcements will be posted on the home page of the bcourses site. Please check regularly for updates.

**Course mail**

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

**Office hours**

Office hours are every Saturday from 9:30-10:30am Pacific and by appointment:

Professor Hector Rodriguez: hrod.youcanbook.me

John Myovich: john_myovich@berkeley.edu
Policies

Due Dates

Please check the online course calendar for assignments and dates due. All assignments are due at 11:59PM PST on dates noted unless otherwise stated.

Late Assignments

Please contact your GSI if you anticipate having a problem meeting a course deadline. Unless communicated PRIOR to the deadline, late assignments will not be accepted. Assignments up to one week late will receive a 20% deduction in points. If 1-2 weeks late, 40% will be taken off. No points will be awarded after 2 weeks.