

**CALIFORNIA STATE UNIVERSITY, LONG BEACH
COLLEGE OF HEALTH AND HUMAN SERVICES
HEALTH CARE ADMINISTRATION DEPARTMENT**

Course Syllabus: HCA 530 – Strategic Planning & Marketing in Health Care

Fall 2018 (rev. 8-5-18)

Instructor: Linda Martinez, Ph.D.

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Office Hours: Tuesdays 6:50 am to 7:50 am;

Tuesdays 9:20 am to 11:00 am;

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to 6.:45 pm; By appointment Monday, Tuesday or

Wednesday – Text me anytime; Call if you need a

quick answer

Course Number: 6774

Class Meets Wednesdays 7:00pm-9:45pm, HHS 1-
Room 200

Additional Contact Information:

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Course Description. Prerequisite/Corequisite: HCA 502. Strategic planning based on analysis of secondary quantitative and qualitative data to study changes in technological, social, political, regulatory, and competitive aspects of the health care market. Letter grade only (A-F).

Course Goals, Competencies and Assessments. The Health Care Administration Department has adopted a competency-based curriculum, based on the American College of Health Care Executives (ACHE) Competencies Assessment Tool and the Healthcare Leadership Alliance (HLA) Competency Directory. For this course, the focus is on acquiring competencies in HLA Domain 5.D, **Business knowledge and skills: strategic planning and marketing.** Alignment of the expected outcomes and the ACHE and HLA competencies provides clear expectations and standards for students and instructors alike. Students will demonstrate a level of proficiency in each of the expected outcomes through the course assignments as indicated in the following table.

Learning Objective	Domain	Competency – Knowledge of	Activity (A1), Assignment (A2) or Assessment (A3)
Compare and contrast strategic, marketing and business plans <ul style="list-style-type: none"> • Locate or formulate a business case statement and exit strategy • Distinguish core and peripheral lines of business 	5.D.	<ul style="list-style-type: none"> • Business plan development and implementation processes • Business planning including business case and exit strategy development 	BSMP Assignment: Business-strategic-marketing plan literature search and organizational contact paper & presentation
<ul style="list-style-type: none"> • Illustrate the use of decision support and competitive/market research methodology • Discover opportunities in trends 	5.D.	Characteristics of strategic decision support (e.g., planning; marketing; modeling; forecasting)	Decision support tool research & demonstration assignment
Apply the principles of crisis and disaster planning	5.D.	Crisis and disaster planning	“Worst case scenario” in-class exercise
Assess business growth and career opportunities in a defined sector of the health care industry	5.D.	Marketing principles and tools (e.g., competitive and market research and data analysis; sales; advertising)	Demand estimate/sales forecast exercise; case study exercise Personal strategic and marketing plan

Learning Objective	Domain	Competency – Knowledge of	Activity (A1), Assignment (A2) or Assessment (A3)
Translate strategies into action plans	5.D.	Implementation planning (e.g., operation plan; management plan)	Objectives, strategies, tactics exercise Worst case scenario exercise Personal strategic and marketing plan
Integrate marketing, business, operational, personnel and finance plans	5.D.	<ul style="list-style-type: none"> • Marketing plan development • Strategic planning processes development and implementation (scenario planning, forecasting, etc.) 	Personal strategic and marketing plan
Formulate mission, vision, values, objectives, priorities and link to planning	5.D.	Organizational mission, vision, objectives and priorities	Personal strategic & marketing plan

Course Assignments:

Information Sheet: Complete the information sheet in the class and complete it online and upload to the dropbox. Upload picture to BeachBoard profile

Linked-In: Create a Linked-In account and send me a contact request.

Team & Individual Assignments. Students will be assigned randomly to two group research and presentation assignments (DST and BSMP). Final exam is an individual assignment (PSMP)

1. **Decision Support Tool (DST) Research and Demonstration:** Each learning team will select a different decision support tool to research and **demonstrate to the class.**
 - a. Your presentation should include:
 - i. a discussion of the tool's purpose
 - ii. target audience
 - iii. typical users
 - iv. typical example of how it is or could be used.
 - v. **Link the data to a key trend/ opportunity in the health care industry** (for example, the growth in the Hispanic population, the aging baby boomer generation, transparency, green technology, etc.).

Samples of sites for data trend identification

- a. Demographic data: California Health Interview Survey (Ask CHIS – <http://www.chis.ucla.edu/>) for county-level poverty level composition, racial composition, health insurance status, eligibility and participation for public programs. Additional demographic data are available from the CA Department of Finance (<http://www.dof.ca.gov/>) and U.S. Census <https://www.census.gov/data/developers/data-sets/Health-Insurance-Statistics.html>.
- b. Hospital quality ratings:
 - CMS Hospital Compare: <https://www.cms.gov/medicare/quality-initiatives-patient-assessment-instruments/hospitalqualityinits/hospitalcompare.html>

- Commonwealth Fund “Why Not the Best” national hospital safety and quality comparative ratings: <http://www.whynotthebest.org/>.
- c. California hospital market share and patient origin data: Office of Statewide Health Planning and Development (OSHPD) hospital market share pivot tables: <https://www.oshpd.ca.gov/HID/Find-Hospital-Data.html> . Also see OSHPD Geographic Information System Interactive Query: http://www.oshpd.ca.gov/General_Info/Healthcare_Atlas.html.
- d. Nursing home, home health quality ratings:
 - Medicare Nursing Home Compare: <http://www.medicare.gov/default.aspx>
 - California Long Term Care Quality ratings: <http://www.calqualitycare.org/>
 - Medicare Home Health Compare: <http://www.medicare.gov/HomeHealthCompare/search.aspx>
- e. Health plan data and report cards:
 - California Department of Managed Health Care health plan utilization and financial reports: <https://www.dmhc.ca.gov/DataResearch/FinancialSummaryData.aspx> .
 - National Commission on Quality Assurance Quality Report Cards: <http://www.ncqa.org/report-cards>
 - California Office of the Patient Advocate: HMO and Medical Group report cards: <http://www.opa.ca.gov/>.
 - California Cooperative Healthcare Reporting Initiative (HMO, PPO, Medicare report cards): <http://www.opa.ca.gov/pages/reportcard.aspx> .
 - Medicare Advantage/Part D reports: <http://www.cms.gov/MCRAAdvPartDENrolData/>
- f. Federally designated medically underserved and health professional shortage areas:
 - Background info, explanation of designations: <https://bhw.hrsa.gov/shortage-designation/hpsas>
 - GIS mapping tool (free registration): <http://www.udsmapper.org/>.

Product: Team Class Presentation and Briefing Slides. One member from each team must send a copy of the team’s power point/ bullet presentation to instructor’s drop box labelled DST Report, Also, teams will **present their DST to the class. Instructor will post times each team presents.**

2. **BSMP Assignment:** Business-strategic-marketing plan literature search and organizational contact paper & presentation. Each learning team will:
 - a. Select a type of plan (business, marketing or strategic). Your role is to be a consultant hired by the selected business to review their plan.
 - b. Find, review and cite at least three articles in the health administration professional literature discussing how to prepare the selected plan type.
 - c. Obtain an example of the selected type of plan from a health care or human service organization (preferable) or from the health administration professional literature.
 - d. Interview a health care industry practitioner who is involved in your plan area, either strategic, business or marketing plan development in his or her organization. Incorporate interview into paper or include as distinct section. Include questions asked in appendix.
 - e. Research and propose software used/available for creating your selected type of plan (specialized packages or application of commonly available products). Include cost estimate, pros and cons of selection
 - f. You must analyze the key elements of the selected plan.
 - i. Identify the principal product or service line
 - ii. Identify and outline gap areas
 - iii. Define the core and secondary businesses
 - iv. Identify and critique or develop if not available:
 1. Business case statement for the product or service
 2. Exit strategy
 - v. Include key learnings

- g. Communicate with other learning teams for your type of plan so that your papers and presentations are not duplicative.
- h. All required elements must be present in team paper and referenced in Class Presentation. You must use different sources and materials from those in the sample student work products posted on BeachBoard and in your text. Each team must use different examples of plans.

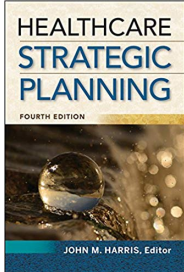
Product: Team Class Presentation and Team Paper. One member of the team must send a copy of the power point presentation to the instructor's dropbox labelled BSMP Report. Instructor will post times each team presents.

3. **Midterm** – The midterm is an individual assignment. You will review 3 professional/educational articles from peer reviewed journals or a professional organization website. You will write a one-page summary of each article. You will post the document (one document with all three summaries) to BeachBoard dropbox by 11.:55 pm 10/10/18.
4. **Final Exam - Personal strategic and marketing plan.** Prepare a strategic and marketing plan for yourself, applying concepts and learnings from this and other courses when applicable. ***The following outline is a starting point to obtain at least a passing grade.*** This is an individual assignment and a take home final exam. It is due in the instructor's drop box labelled **PSMP NLT**. Earlier submissions are encouraged.
 - Personal Mission/vision statement (long term, big picture)
 - Objectives (short term, measurable, time-specific: where do you want to be within 1 year post-graduation, in 3-5 years?)
 - Description of Target market (location, type of organizations)
 - Industry Sector Research. Your paper should also include overview research on at least one healthcare industry sector (e.g. hospitals and health systems, health plans, long-term care, etc.) where you would like to work in the future. Prepare an industry profile, including but not limited to the following:
 - a. Number of firms, degree of concentration, market leaders
 - b. Market size, growth trends and potential
 - c. Key industry leaders, observers and experts (academic, professional)
 - d. Professional association; criteria for membership
 - e. Work force profile, preferred executive characteristics
 - Identify at least 5 companies within the industry sector(s) of interest as potential employers. Prepare a chart summarizing relevant information pertaining to your future employment search. Approach it as “due diligence,” in the same manner an employer would conduct a background check on you as a potential future employee. Include at least 4 personal priorities that you will use to compare the organizations
 - Personal SWOT analysis
 - Differentiation strategy
 - Competitive advantage: Current, potential
 - Promotional strategies and tactics
 - a. Strategies—general approach to achieve objectives
 - b. Tactics—specific activities
 - Budget to secure next level job
 - Time Line
 - Personal key learnings discovered as a result of completing this exercise.

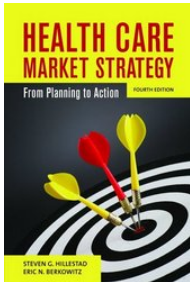
- **Your paper should include at least 5 reference citations on career development, preferably related to health care administration.**
- ***Maximum length—2,500 meaningful words (about 10 pages); outline or bullet point form preferred.***
- ***Document all sources using APA style.***

Product: Individual Paper. Send to instructor's drop box labelled **PSMP Report**.

Required Texts and Reading Materials:

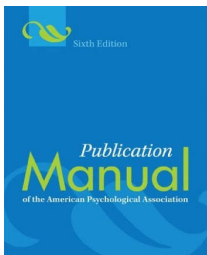


Harris, J. M. (Eds.). (2018), *Healthcare strategic planning*. Chicago, IL: Health Administration Press.



Hillestad, S. G. & Berkowitz, E. N. (2013). *Health care market strategy*. 4th ed. Burlington, MA: Jones and Bartlett.

Recommended Texts



American Psychological Association. (2010). *Publication manual of the American Psychological Association* (6th ed. 3rd printing). Washington, DC: Author.

Additional Material

There may also be articles posted on BeachBoard.

Other Requirements: E-mail address and Internet access to use the online BeachBoard course software system. If you have problems, contact the CSULB Technology Help Desk by phone at 562-985-4959 via e-mail at helpdesk@csulb.edu or in-person at the Home Center. Presence of documents in the instructor's drop box that the instructor can open and reviewed, determines if the documents have been received.

Course Assignments, Deadlines

Assignment	Points	% of Grade
Student Information (Upload picture to BeachBoard	10	2.2%
Linked-In	8	1.8%
APA Quiz	20	4.4%
Decision Support Tool (PowerPoint)	40	8.9%
Decision Support Tool (Presentation)	20	4.5%
Decision Support Tool (Critique of groups)	10	2.2%
Midterm	55	12.2%
Business Strategic Marketing Plan (Submission to dropbox)	60	13.3%
Business Strategic Marketing Plan (Presentation)	30	6.7%
Business Strategic Marketing Plan (Critique of groups)	10	2.2%
Final exam- Personal Strategic Marketing Plan	100	22.2%
In-class exercise A	10	2.2%
In-class exercise B	10	2.2%
In-class exercise C	10	2.2%
Mission statement	15	3.4%
Sign In attendance log (Includes significant class engagement) 14 X 3	42	9.4%
Total	450	100%

HCA 530 Grading:

A = 450 - 402 = Exceptionally OUTSTANDING work, includes a great deal of depth of reflection on the topics under discussion, use of research citations and or other significant contributions, is far beyond basic requirements, far exceeds standards on rubrics as posted in the BB course content section.

B = 401 – 357 = SUPERIOR work, far exceeds standards listed below, includes a great deal of reflection on assigned topics, includes several meaningful contributions beyond the basic instructions, far exceeds minimum meaningful word count

C = 356 – 312 points = GOOD work, covers all the items in the assignment, polished, easily understood, contains no syntax, spelling, punctuation or grammatical errors. Follows all the instructions, meets the minimum suggested word count. Viewed as getting the work done.

D = 311 - 267 points = Below ACCEPTABLE work, fails to cover all assigned topics, contains grammatical, syntax, spelling, punctuation errors, all instructions are not followed, does not meet suggested minimum meaningful word count, work does not meet stated requirements.

F= < 266 points = Unacceptable work submitted, and/or assignments not submitted, or submitted past the not later than due date without instructor being notified at least a day in advance of the due date, without an acceptable excuse as defined by CSULB policy.

There will be no curving or rounding up of final grades.

Student Assignments and Grading

Assignments are due by 11:55 p.m. in the BeachBoard Dropbox. Late assignments will receive zero points. Please advise instructor if you require special accommodations for disability or cannot attend a class session for religious reasons.

- Learning teams: All team members will receive the same grade for papers and presentations (DST and BSMP)

- Attendance and Participation. Based on any significant contributions to classroom discussions and completion of in-class exercises.
- **Document all written work with appropriate bibliographic and electronic citation protocols in APA style**; see style manual and (for website citations) <http://www.apa.org/journals/webref.html>; <http://www.csulb.edu/library/eref/vref/style.html>.

Relevant University Policies

- Cheating and Plagiarism. Please be aware of and ensure that your behavior conforms to University Policy. See: http://www.csulb.edu/divisions/aa/catalog/2009-2010/academic_information/cheating_plagiarism.html.
- Withdrawal Policy. Per University policy; see: http://www.csulb.edu/divisions/aa/catalog/2009-2010/academic_information/withdrawal_policy.html. Withdrawal after 2nd week and before final 3 weeks “permissible for serious and compelling reasons;” instructor will evaluate student withdrawal requests on a case by case basis.
- Attendance and Participation. Attendance policy conforms to: http://www.csulb.edu/divisions/aa/catalog/2009-2010/academic_information/registration_holds.html.
- **Course Schedule and Assignments (may change depending on class size, guest speakers schedules)**

Week	Topic	Reading Assignments	Deliverable/Activity
1 8/29/18	Welcome, Introduction APA information . The Value of Strategic Planning Strategic Development and the Strategic Mindset, lecture	Submit student information sheet to instructor’s drop box. Bring a copy to class also. Form at the bottom of the content section in BB course content. Course Overview, Syllabus. Harris Chapter 1 (pp. 3-21) Hillestad Chapter 1 (pp. 1-33) -	Student Information page to the dropbox and to class
2 9/5/18	Review of major course assignments Benefits of Strategic Planning Understanding the Strategic, Business, and Marketing planning Process.	Major assignments posted on BB, Rubrics, samples Harris Chapter 2 (pp. 25-45) Hillestad Chapter 2 (pp. 36-56)	APA Quiz online Due 9/5/18
3 9/12/18	Service area & competitor analysis Organizing for Success Challenge of a Competitive Marketplace DST Assignment	Guest speaker: Jeff Pratt, Director of Strategy, Speed Track, Inc. Demonstration use of DST in Big Healthcare Data Analysis Harris Chapter 3 (pp. 63-81) Hillestad Chapter 3 (pp. 49- 61)	

4 9/19/18	Meet in Library Room 305 Major Planning Process Considerations Conducting the Internal and External Assessment (Market Research),	Harris Chapter 4 (pp. 86-129) Hillestad Chapter 4 (pp. 63-81)	
5 9/26/18	DST team presentations Encouraging Strategic Thinking Creating the Mission, the Vision, and Critical Success Factors	DST team presentations Harris Chapter 5 (pp. 83-100) Hillestad Chapter 5 (pp. 130-155)	One copy of each DST team's power point presentation is due to drop box Team members presenting, will peer review teammates, and turn send critiques
6 10/3/18	Continue DST presentations Analyzing the Environment Strategy Action Match	DST presentations continue Harris Chapter 6 (pp. 105-133) Hillestad Chapter 6 (pp. 157-197)	Team members presenting, will peer review teammates, and turn send critiques
7 10/10/18	No Class this week Organizational Direction Determining Marketing Actions	Harris Chapter 7 (pp. 135-154) Hillestad Chapter 7 (pp. 198-263)	Submit midterm 10/10/18 Personal Mission Statement Due 10/14/18
8 10/17/18	The Strategy Formulation Integration of the Marketing Plan with the Business Plan and the Strategic Plan	Harris Chapter 8 (pp. 157-182) Hillestad Chapter 8 (pp. 268-275)	
9 10/24/18	Transitioning to Implementation, Approving and Monitoring Process	Harris Chapter 9 (pp. 183-203) Hillestad Chapter 9 (pp. 276-291)	
10 10/31/18	Annual Review and Update Conclusion	Harris Chapter 10 (pp. 209-225) Hillestad Chapter 10 (pp. 293-306)	
11 11/7/18	Crisis planning and disaster planning in Health Care	Guest speaker, Richard Hahn, retired FBI Special Agent, Explosives and	

	Enabling More Effective Execution Sample Strategic and Marketing Plan Review BSMP progress	Terrorism Investigator Harris Chapter 11 (pp. 229-251) Hillestad Appendix B (pp. 314-332)	
12 11/14/18	Addressing Innovation in Strategic Planning Model Form	Harris Chapter 12 (pp. 253-277) Hillestad Appendix C (pp. 333-335)	
13	Fall break, Thanksgiving 11/19/18 to 11/25/18	ENJOY time with family and friends	
14 11/14/18	Future Challenges for Strategic Planners Review BSMP and PSMP progress	Harris Chapter 13 (pp. 279-290)	BSMP Due to Dropbox 12/2/18
15 12/5/18	Business Strategic Marketing Plan (BSMP) Team presentations		Critiques Due
16 12/12/18	BSMP presentations Review progress on PSMP Last day of class		Critiques due
12/19/18	Final exam	Final exam, the PSMP, an individual assignment	Due to Dropbox 12/19/18

Bibliography

Books/Journal Articles

Berkowitz, E. N. (2017). *Essentials of health care marketing* (4th ed.). Sudbury, MA: Jones & Bartlett.

Cellucci, L., Wiggins, C., & Farnsworth, T. (2013). *Healthcare marketing: A case study approach*. Chicago, IL: Health Care Administration Press.

Centers for Disease Control and Prevention. (2018). *Preparation and planning*. Retrieved from

<https://emergency.cdc.gov/planning/index.asp>

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- Ginter, P. M., Duncan, W. J., & Swain, L. E. (2018). *Strategic management of health care Organizations* (2018). Hoboken, NJ: Wiley
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- Kim, W. C., & Maubornagne, R. A. (2017). *Blue ocean shift: Beyond competing – Proven steps to inspire confidence and seize new growth*. Boston, MA: Hachette Book Group.
- Hicks, N. J. & Nicols, C. M. (2017). *Health industry communication: New media, new methods, new message* (2nd ed.). Sudbury, MA: Jones & Bartlett.
- Leone, F. H. (2012). *Marketing healthcare services to employers: Strategies and tactics*. Santa Barbara, CA: Sea Hill Press, Inc.
- Masterson, R., & Pickton, D. (2014). *Marketing: An introduction*. Thousand Oaks, CA: Sage Publishing.
- Mayo Clinic Center for Social Media. (2012) *Bringing the social media revolution to health care*. Rochester, MN: Mayo Clinic Foundation for Education and Research.
- Mintzberg, H. (2013). *The rise and fall of strategic planning*. New York: Free Press.
- Provines, C. D. (2014). *Healthcare value selling: Winning strategies to sell and defend value in the*

new market. Hanover, NH: Healthcare Values Institute, LLC.

Richter, J. P., Muhlestein, D. B. & Wilkes, C. E. (2014). Social media: How hospitals use it, and Opportunities for future use. *Journal of Healthcare Management* 59(6), 447-60.

The Society for Healthcare Strategy and Market Development. (2016). *Futurescan 2017-2022: Healthcare trends and implications*. Chicago, Illinois: American College of Healthcare Executives.

Thielst, C. B. (2010). *Social media in health care: Connect, communicate, collaborate*. Chicago: Health Administration Press.

Thomas, R. K. (2015). *Marketing health services*. Washington, DC: AUPHA/HAP.

Topol, E. (2013). *The creative destruction of medicine: How the digital revolution will create better health care*. New York: Basic Books.

Tuten, T. L. & Solomon, M. R. (2015). *Social media marketing* (2nd ed.). Thousand Oaks, CA: Sage.

VanAuken, B. (2013). *Brand strategy and healthcare reform*. Retrieved from <https://www.brandingstrategyinsider.com/branding-and-healthcare>.

Ventola, C. L. (2014). Social media and healthcare professionals: Benefits, risks and best practices. *Pharmacy and Therapeutics*, 39(7), 491-499.

Journals:

Strategic Healthcare Marketing: eHealth Strategy & Trends (monthly newsletter: publisher Health Care Communications)

Marketing Health Services; Harvard Business Review; Frontiers of Health Service Management; Journal of Healthcare Management

Websites:

CSULB Business Library web site: <http://www.csulb.edu/library/subj/business/>.

California HealthCare Foundation has a daily (weekdays) **free** electronic newsletter, *California Healthline*, which provides excellent information on current events in the healthcare industry and a

wealth of issue briefings, research reports and other materials for both healthcare professionals and the general public. www.chcf.org.

Journals, Online Websites and Blogs References: (These references are not APA formatted – the sources below additional cites you can visit for information.)

Journals

Business: Advertising Age, Business Week, Fortune, Forbes, Journal of Marketing, Journal of Marketing Research, International Journal of Research in Marketing, Journal of Consumer Marketing
Academic/Healthcare: Journal of Advertising Research, Marketing Health Services, Health Marketing Quarterly, Modern Healthcare, Hospitals and Health Networks

Web Sites

California HealthCare Foundation: Grant Information: <http://www.chcf.org/grants>.
 Healthcare Social Media: 20 of the Best Healthcare Marketing Websites
<https://thegoagencyusa.com/healthcare-marketing/healthcare-social-media-20-of-the-best-healthcare-marketing-websites/>
 Healthcare Success Strategies: www.healthcaresuccess.com
 Pew Research Internet Project: <http://www.pewinternet.org/>
 Red Fire Branding: www.redfirebranding.com
 Society for Healthcare Strategy & Market Development: <http://www.shsmd.org/>

Blogs

8 Examples of Brilliant Healthcare Marketing: <https://blog.hubspot.com/marketing/brilliant-healthcare-marketing#sm.0000388br81bkme95z7kqhfqhdtor>

Franklin Street Healthcare Marketing Resources: <http://www.franklinstreet.com/healthcare-marketing-trends>

Healthcare Marketing: The 5 Best Blogs to Follow:
<http://www.kbkcommunications.com/blog/healthcare-marketing-5-best-blogs-follow>

Healthcare Marketing Matters: <http://healthcaremarketingmatters.blogspot.com/>

The Health Care Blog: <http://thehealthcareblog.com/>

Top 25 Health Care Blogs: <http://www.cision.com/us/2013/10/top-25-healthcare-blogs/>

25 Marketing Experts You Should Follow: <http://blog.evisit.com/25-healthcare-marketing-experts-follow>

STUDENT INFORMATION SHEET

HCA 530-Fall 2018

Name _____**Name you prefer to use** _____**Address** _____
_____**Phone(s):** _____**Best time/place to reach you:** _____**E-mail address:** _____**Please describe briefly:****a. Your educational background and work experience:****b. Future career goals:****c. Languages you speak and write:****Please send to instructor's drop box , labeled Student Information Sheet, prior to class # 1.**