

STRATEGIC PLANNING

The ability for Health Administration trainees to apply strategic planning to the health care arena.

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COMPETENCY OBJECTIVES	✓	SUGGESTED LEARNING ACTIVITIES	COMMENTS
<p>Objective A: All HA trainees will demonstrate a mastery of the basics of strategic planning, including the six basic steps in the strategic planning process (e.g., vision, mission, values, SWOT analysis, strategy formulation, and strategy implementation), and the issues associated with effective planning.</p>			
<p>1. Competency: Knowledge of the basics of strategic planning and ability to apply the six basic steps in the strategic planning process: (e.g., Vision, Mission, Values, Strengths, Weaknesses, Opportunities, and Threats (SWOT) Analysis, Strategy formulation, and Strategy implementation).</p>		<p>The discipline advisor must ensure that the trainee has successfully completed one or more courses in Strategic Planning.</p>	<p>For more information on the basics of strategic planning see: http://www.allianceonline.org/FAQ/strategic_planning/.</p>
<p>2. Competency: Ability to define elements of strategic planning and strategic management, including the six basic steps in the strategic planning process, and explain in more detail the major attributes and characteristics implied within those definitions.</p>		<p>The trainee should be encouraged to provide seminars covering the basics of strategic planning to non-health administration trainees.</p>	<p>This could be done by presenting to the LEND class in a didactic setting.</p>
			<p>The trainee could also provide some advising to other faculty or clinic directors.</p>

Objective B: All HA trainees will be able to assess the macro and micro environment of the LEND Program and/or Clinic.

1. Competency: Ability to apply strategic analysis tools to assess the macro and micro environment of the LEND Program and/or Clinic(s).		The trainees will work with the HA Coordinator to assess the macro and micro environment of the LEND Program and/or Clinic(s).	For more information on the basics of strategic planning see: http://www.allianceonline.org/FAQ/strategic_planning/what_is_situati_on_assessment.faq .
		The trainee should analyze his or her assessment with a specific emphasis on identifying areas of growth and improvement, and should share recommendations with the Program/Clinic Director.	It is important to understand that advice or feedback may have unexpected and unwelcome consequences.

Objective C: All HA trainees will be able to assess an existing LEND-related strategic planning effort.

<p>1. Competency: Ability to apply the six basic steps in the planning process to assess the planning effort and provide constructive feedback to the clinic or program director.</p>		<p>The trainees should work with a clinic or program director to identify the specific strategic planning activity that the student will focus upon. This should be a planning activity that the director would appreciate feedback to improve.</p>	<p>Learning to elicit strategic planning information from non-strategic planning users is a key skill.</p>
<p>2. Competency: Ability to assess the implementation of a strategic planning effort.</p>		<p>Having understood the intent of the effort (Objective B1), the trainee should assess how well the effort meets this objective.</p>	<p>Strategic planning efforts may formulate good goals, objectives, and strategies but the execution of the plan may fall short of the mark. Sometimes an outside audit like this can help bring such a mismatch to light and help the organization get plan implementation back on track. For more information on the basics of strategic planning see: http://www.allianceonline.org/FAQ/strategic_planning/how_do_we_increase_our_faq.</p>

Objective D: HA trainees will be able to integrate their strategic analysis and planning efforts into the development of a business plan.

1. Competency: Ability to integrate their strategic analysis and planning efforts into the development of a business plan.		The trainees should integrate their analysis (and feedback from the clinic or program director) to document the justification and evaluation of the business opportunity, including the macro and micro environmental context in which the opportunity exists.	Learning to elicit strategic planning information from non-marketing users is a key skill.
		The trainee should be clear on the intent and the target for this business plan.	

<h2 style="margin: 0;">MARKETING</h2> <p style="margin: 0;"><i>The ability to apply key marketing concepts to the health care arena. Marketing has been defined as is the process of planning and executing the conception, pricing, promotion, and distribution of ideas, goods, and services to create exchanges that satisfy individual and organizational objectives.</i></p>	DATE COMPLETED
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COMPETENCY OBJECTIVES	✓	SUGGESTED LEARNING ACTIVITIES	COMMENTS
Objective A: All HA trainees will demonstrate a mastery of the basics of Marketing, including Marketing Strategy, the Marketing Mix (e.g., the 4 P's), Positioning, Segmentation, Target Market and Social Marketing.			
1. Competency: Knowledge of the basics of Marketing, including Marketing Strategy, the Marketing Mix (e.g., the 4 P's), Positioning, Segmentation, Target Market and Social Marketing.		The discipline advisor must ensure that the trainee has successfully completed one or more course in Marketing.	
2. Competency: Ability to explain the basics of Marketing, including Marketing Strategy, the Marketing Mix (e.g., the 4 P's), Positioning, Segmentation, Target Market and Social Marketing.		The trainee should be encouraged to provide seminars covering the basics of marketing to non-marketers.	This could be done by speaking to the LEND class in a seminar. <i>The time commitment for this should be about an hour for the presentation and whatever prep time is needed.</i>
			The trainee could also provide some advising to other faculty or clinic directors.

Objective B: All HA trainees will be able to assess a LEND-related marketing effort (e.g., marketing plan, marketing promotion (e.g., advertisement, brochure, and poster), marketing audit, etc.).

1. Competency: Ability to work with a clinic or program director to identify a marketing effort concerning which the director would appreciate feedback.		The trainees should work with a clinic or program director to identify the <i>specific marketing activity</i> on which the student should focus.	Unsolicited advice or feedback may have unexpected and unwelcome consequences.
		The trainee should be clear on the intent of the marketing effort and the target for this effort.	Learning to elicit marketing information from non-marketing users is a key skill.
			<i>The time commitment for this step will probably be about an hour.</i>
2. Competency: Ability to assess a targeted marketing effort for its efficacy in meeting its goals, the consistency of its message, appropriate encoding and decoding of its message, and suitability of its reach and frequency (if applicable).		Having understood the intent of the effort (Objective B1), the trainee should assess how well the effort meets this objective.	Marketing efforts may be well executed but not suited to the original task. Sometimes an outside audit like this can help bring such a mismatch to light.
		The trainee should assess the effort's consistency of message, appropriate coding and decoding, and suitable reach and frequency (if applicable).	The trainee may help the director become more aware that messages may be decoded very differently by different cultural subgroups (e.g., a message with a great deal of text may be ideal for the highly educated adult, and less appropriate for teen moms).
			<i>The time commitment for this should be several hours.</i>

Objective C: HA trainees will be able to assist a LEND-related clinic, program or support organization in their production of a marketing plan. While Objective B directed the trainee to evaluate an existing marketing effort this Objective involves the student in the creation of a new or updated marketing plan.

<p>1. Competency: Ability to assess a clinic's existing marketing plan if it exists or to outline the implicit marketing plan the clinic seems to be following if no written plan exists.</p>		<p>The trainees should work with a clinic or program director to review the organization's marketing plan. If one does not exist the trainee should assess the implicit marketing plan (i.e., product strategy, pricing strategy, promotion strategy, delivery strategy, positioning efforts and target market) that underlies the clinic's current business model.</p>	<p>It is not unusual for a clinic not to have a marketing plan. However, if the clinic is operational, the trainee should be able to write out the apparent product strategy, etc</p> <p>The trainee may find serious contradictions within the overt or implicit marketing plan. This is not unusual. The trainee should be clear that the intent of the marketing effort is to support and teach rather than to criticize.</p>
			<p><i>The time commitment for this step will be about 3 - 6 hours.</i></p>
<p>2. Competency: Ability to support the development of a marketing plan that meets the clinic's goals, is consistent, and directly applicable to the staff in the clinic.</p> <p><i>(continued on next page)</i></p>		<p>Working closely with the HA coordinator, the trainee should generate a Letter of Intent, clearly outlining his/her responsibilities. The LEND HA coordinator should provide significant direction for the student and should assess the work at the end for accuracy, clarity, contribution and meeting the stated goals of the Letter of Intent.</p>	<p><i>If the trainee wishes, this could be a full year project. Or, this could be more limited in scope, lasting only a few hours.</i></p>
		<p>The trainee should develop a statement of the objectives and underlying business model that describes the goal and role of the clinic.</p>	<p>The trainee should work closely with the clinic staff to refine a statement everyone feels comfortable with.</p>

	The trainee should develop a positioning statement for the clinic including the target market, the broad category of services provided and the strategic competitive advantage the clinic has.	The trainee may find considerable resistance in the clinic as he/she forces the staff to think in business terms (e.g., competitive advantage).
	The trainee should develop a clear description of the various target markets the clinic serves including obvious one (e.g., clients) and less obvious (e.g., legislature).	The trainee should work closely with the clinic staff to make sure all targets have been identified.
	The trainee should develop a clear description of the ideal marketing mix (i.e., product, price, place and promotion) for each target market the clinic serves.	This is a very time consuming process but is the heart of the marketing plan. The student may need substantial support from the HA coordinator.
	The trainee should compose a summary of his/her assessment with suggestions, plans for changes in the marketing mix for various targets, ideas for strengthening the marketing of the clinic and ways that the clinic can assess the efficacy of the proposed changes.	This is also a very time consuming process but is the heart of the marketing plan. The student may need substantial support from the HA coordinator.
	The trainee should share the proposed marketing plan with appropriate staff in the clinic and incorporate any suggestions that are improvements to the plan.	

OPERATIONS MANAGEMENT

The ability to apply key operations concepts to the disability health care arena including scheduling and control, facilities, job design, technology use, materials management and quality management.

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COMPETENCY OBJECTIVES	✓	SUGGESTED LEARNING ACTIVITIES	COMMENTS
Objective A: All HA trainees understand and can address the unique scheduling needs presented by an interdisciplinary clinical environment when serving children with special health needs.			
1. Competency: Apply knowledge of work flow, time and motion study develop clinic scheduling that is sensitive to special needs of this population and decreases wait time.		Visit with clinic scheduling and clinic management with floor plan and list of clinicians to be engaged in clinical billable time.	
		Interview a sample of families about scheduling, clinic space, parking, etc. to learn what is helpful or not.	
		Follow a family from the scheduling of an appointment to the final bill payment and referral process and compare to the clinician's experience around that same appointment.	
		Create a flow chart of problems and possible solutions families and clinicians face on a typical clinic day.	

2. Competency: Apply principles of organizational theory and design to the unique challenges of managing an interdisciplinary clinic serving child with neurodevelopment disabilities.		Develop creative solutions for barriers in accessing care for children with disabilities.	
		Develop a clinic schedule sensitive to special needs of the patients with disabilities and their families and to decrease wait time.	
3. Competency: Trainee has an awareness of the complexity of needs to be addressed within the array of special needs children.		Trainees read <i>Meeting the needs of the developmentally disabled: How doctors offer treatment</i> at http://www.ama-assn.org/amednews/2004/08/02/hlsa0802.htm	
4. Competency: Address the increased needs of families to easily and directly reach healthcare providers due to chronic or unstable medical conditions.		Look at ER usage costs versus increased on-call availability.	
		Interview families and clinicians about their experiences when a family member needs to reach HC provider in an urgent/emergent situation.	

Objective B: Trainees can address the unique human and environment factors that impact the operation of an interdisciplinary clinic serving children with special health needs and their families

<p>1. Competency: Be able to integrate scheduling, visits and billing & referrals in a timely manner for persons with disabilities. IFMA Facility Management Definition: Facility management is a profession that encompasses multiple disciplines to ensure functionality of the built environment by integrating people, place, process and technology.</p>		<p>Special Resources to Review: <i>Competencies for Management Professionals</i> available through IFMA and the IFMA website: http://www.ifma.org/certification/.</p>	
<p>2. Competency: Address personnel needs for bilingual staff, use of interpreters and liability issues related to miscommunication.</p>		<p>Identify the need and recruiting plan to increase and make available bilingual staff and interpreters in the language of the family (and in a rural setting).</p>	
<p>3. Competency: Be able to identify the environmental factors that challenge providing adequate and safe access to specialty clinical care to children with special health needs when complying with ADA access regulations. OR Competency: Ability to consider patient convenience and safety when complying with ADA access regulations.</p>		<p>Survey a structural/physical barrier in a clinical facility to identify potential barriers for particular groups of patients.</p>	
		<p>Develop an evacuation plan for persons with disabilities.</p>	
		<p>Attend NW ADA Training on building access and full access to services delivered within a business.</p>	

4. Competency: Plan, manage and support the organization's technologies infrastructure in relation to any special needs presented by serving a population with disabilities and special health needs.		Review OHSU's guidelines at www.ohsu.gov/SLTC/healthcarefacilities/ .	
		Identify technologies required to support organizational technological infrastructure.	
		Interview Information Systems Manager to identify special technological requirements to support clinical operations.	
5. Competency: Ability to problem-solve environmental issues (air flow, temp, purity) to decrease triggers for asthma, allergies, infections, etc.		Analyze air quality standards for general building maintenance versus needs of people with respiratory conditions or compromised immune systems.	
6. Competency: Address convenience and safety related to parking for persons with physical disabilities and their families.		Interview patients and families.	
Objective C: Trainees can design, implement and evaluate activities which promote quality assurance and quality improvement in neurodevelopmental clinical practice that is consistent with national performance measures and best practices, including family-centered care.			
1. Competency: Know principles of evidence-based medicine and best practices, how to retrieve information on diagnosis and treatment guidelines, and how to apply the principles and guidelines to the context of diagnostic and treatment services for children with neurodevelopmental disabilities.		Examine current clinic practices in light of current diagnostic and treatment guidelines for a range of developmental disabilities for which such guidelines may exist (see www.ahrqtoolbx.gov).	

<p>2. Know the principles and methods of a variety of approaches to continuous performance improvement, such as root cause analysis, rapid cycle quality improvement, and total quality management, and apply to neurodevelopmental disabilities.</p>		<p>See www.ahrq.gov/chttoolbx.</p>	
<p>3. Understand how to measure and monitor care processes and outcomes related to quality improvement efforts in neurodevelopmental clinics.</p>		<p>Select a care process in the current clinic setting which has been identified as problematic for clinical staff or patient concerns and apply one of the CQI methods to change current practice.</p> <p>Identify outcomes and design tools to measure outcomes (or use validated measures) that address both patient and provider goals of quality improvement efforts. Examples of outcomes include patient satisfaction, patient quality of life, patient functional status, provider satisfaction and provider efficiency measures.</p>	

<h2 style="margin: 0;">FINANCE AND BUDGETING</h2> <p style="margin: 0;"><i>The ability to apply financial management skills to the CSHCN health care arena.</i></p>	DATE COMPLETED
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COMPETENCY OBJECTIVES	✓	SUGGESTED LEARNING ACTIVITIES	COMMENTS
<p><u>Objective A:</u> All HA trainees will demonstrate a mastery of the basics of financial management, including budget cost accounting and financial analysis.</p>			
<p>1. Competency: Knowledge of the basics of Financial Accounting/Financial Management.</p>		<p>The discipline advisor must ensure that the trainee has successfully completed one or more courses in Financial Accounting/Financial Management.</p>	
<p>2. Competency: Ability to explain the basics of Financial Accounting/Financial Management to colleagues and fellow trainees.</p>		<p>The trainee should be encouraged to provide seminars covering the basics of financial accounting to non-marketers. Topics of interest to all LEND trainees include familiarity with a balance sheet, break-even analysis, cash flow, and "costing out" a service (fully allocated costs).</p>	<p>This could be done by speaking to the LEND class in a seminar. <i>The time commitment for this should be about an hour for the presentation and whatever prep time is needed.</i></p>

Objective B: LEND Health Administration trainees will understand the unique financial challenges and implications of operating an interdisciplinary CSHCN clinic.

<p>1. Competency: LEND trainees will understand the unique Financial Accounting/Financial Management related to running a CSHCN clinic.</p>		<p>The trainee should work with a CHSCN clinic director to identify factors that alter the application of direct application of business principles in CHSCN clinics, such as needing to provide Federally mandated services even when income does not meet expenses and alternative accounting and financing strategies to compensate for expensive, poorly reimbursed services.</p>	<p>The trainee should identify a director with whom she/he may work over the course of several weeks. The initial contact should be an information interview in which the trainee asks the director to identify differences the directors sees in the CSHCN clinic and other health care or for profit settings. After this initial discussion the trainee should becoming more integrated in the CSHCN clinic to better understand its Financial Accounting/Financial Management.</p>
<p>2. Competency: LEND HA trainees will have a basic understanding of the role of coding and coding decisions on CHSCN clinic Financial Accounting/Financial Management.</p>		<p>The trainee should work with a CHSCN clinic director to understand the role that coding decisions play in the provision of care in a CHSCN clinic.</p>	<p>The trainee should pay particular attention to the issue of reimbursement for the extra time that complex medical problems demand from the clinic.</p>
<p>3. Competency: LEND HA trainees will understand the impact that the multidisciplinary team has on the clinic's bottom line.</p>		<p>The trainee should work with a CHSCN clinic director to understand the various staffing needs, the nature of the demand for these professionals and the means that the clinics has to ensure financial viability with this staff.</p>	

Objective C: All HA trainees will be able to assess a LEND-related proposal budget and financial targets.

1. Competency: LEND HA trainees will be able to review a budget for completeness and consistency.		The trainee should work with a CSHCN clinic director to identify a budget that the trainee could review with the discipline coordinator. If no budget is available in this clinic, the trainee find one elsewhere to review with the discipline coordinator.	By <i>complete</i> , the student should look for budgets that include <u>all relevant costs</u> . By <i>consistent</i> , the student should look for assumptions that are made and whether these assumptions are applied across the budget.
		The trainee should interview several administrators for their perspective on the purpose of budgets and what makes for a useful or useless budget.	
2. Competency: LEND HA trainees will be able to develop a complete and consistent budget for a clinic or program.		The trainee should work with a CSHCN clinic director to identify a clinic or program that could benefit from having a complete and consistent budget.	This budget could be a stand alone project taking several hours (about 10), or it could be a larger project forming the basis for a multi-year pro-forma as part of a business plan.
		The trainee should meet with the clinic director, the program manager or the Discipline Coordinator to assess the budget's completeness and consistency.	

<h2 style="margin: 0;">BUSINESS PLANNING</h2> <p style="margin: 0;"><i>The ability to apply business concepts to the development of a health industry business plan.</i></p>	DATE COMPLETED
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COMPETENCY OBJECTIVES	✓	SUGGESTED LEARNING ACTIVITIES	COMMENTS
Objective A: All HA trainees will demonstrate a mastery of business plan development activities			
1. Competency: Knowledge of the business plan components.		The trainee/s will create a template for a business plan.	

Objective B: All HA trainees will be able to evaluate the organization strategic plan and assess the need for a business plan for the LEND host organization			
1. Competency: Ability to work with a clinic or program director to identify organizational development opportunities.		The trainee/s will work with program/clinic director to identify a business problem.	
		The trainee/s will work with the program/clinic director to delineate a business model for addressing the problem.	

Objective C: All HA trainees will be able to assist a LEND clinic/program/organization in the production of a business plan targeting a specific business problem.

1. Competency: Ability to work with the program/clinic director to integrate marketing analysis with a business plan.	Having identified the business model the trainee should complete a marketing analysis.	
	Having completed the marketing analysis the trainee/s will work with program/clinic director to incorporate findings within the business plan template.	
2. Competency: Ability to work with the program/clinic director to integrate operational analysis with a business plan.	Having identified the business model the trainee should complete an operational analysis.	
	Having completed the operational analysis the trainee/s will work with program/clinic director to incorporate findings within the business plan template.	
3. Competency: Ability to work with the program/clinic director to integrate financial analysis with a business plan.	Having identified the business model the trainee/s should complete a financial analysis.	
	Having completed the financial analysis the trainee/s will work with program/clinic director to incorporate findings within the business plan template.	
4. Competency: Ability to effectively communicate a business plan to all stakeholders.	Having worked with the program/clinic director a business plan trainee/s will prepare material for stakeholder presentation.	
	Having prepared stakeholder presentation materials trainee/s will organize a meeting for presentation of the business plan.	
	Having presented the business plan to all stakeholders trainee/s will work with the program/clinic director to secure endorsement from all stakeholders.	