

<h2 style="margin: 0;">STRATEGIC PLANNING</h2> <p style="margin: 0;"><i>Goal: To enhance non-Health Administration trainees' understanding of and ability to participate in the development of strategic plans that includes strategies to meet the needs of children and youth with neurodevelopmental disabilities and their families.</i></p>	<b>DATE COMPLETED</b>
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COMPETENCY OBJECTIVES	✓	SUGGESTED LEARNING ACTIVITIES	COMMENTS
<b>Objective A: Non-HA trainees will have an understanding of the concept and definition of strategic planning as well as the basic steps in the strategic planning process (e.g., vision, mission, values, SWOT analysis, strategy formulation, and strategy implementation).</b>			
1. Competency: Knowledge of the basic concepts and definition of strategic planning as well as the basic steps in the strategic planning process: (e.g., Vision; Mission; Values; Strengths, Weaknesses, Opportunities, and Threats (SWOT) Analysis; Strategy formulation; and Strategy implementation).		The HA discipline advisor or HA trainee should instruct the non-HA trainees using the strategic planning case studies and other strategic planning learning materials. Upon completion of the instruction non HA trainees should be able to successfully answer the attached questions.	For more information on the basics of strategic planning see: <a href="http://www.allianceonline.org/FAQ/strategic_planning/">http://www.allianceonline.org/FAQ/strategic_planning/</a> .  Students could be directed to a number of basic business or health care strategic planning texts (attached).
2. Competency: Knowledge of "why" vision and mission statements are needed and important as well as what are the characteristics of good vision and mission statements. Also, trainees should be able to translate this learning into written vision and mission statements.		The non-HA trainees should be instructed and directed by the HA discipline advisor or HA trainee to strategic planning materials addressing vision and mission statements.  Students may be directed to the vision and mission statements of their own organization and discuss the implications of the content of their organization's vision and mission statements for their LEND program and children and youth with neurodevelopmental disabilities.	Students could be directed to a number of health care organization websites. These websites often include the organization's vision and mission statement.  For more information on the basics of strategic planning see: <a href="http://www.allianceonline.org/FAQ/strategic_planning/what_is_situati_on_assessment.faq">http://www.allianceonline.org/FAQ/strategic_planning/what_is_situati_on_assessment.faq</a> .

**Objective B: Non-HA trainees will be able to assess the strengths and weaknesses of the LEND Program and/or Clinic as well as its environmental opportunities and threats by performing a SWOT analysis.**

1. Competency: Capability to facilitate a SWOT analysis to assess the LEND program or a LEND-related clinic or affiliated community program's strengths and weaknesses as well as the environmental opportunities and threats.		The HA discipline advisor or trainee could engage non-HA trainees in a SWOT analysis brainstorming session addressing questions such as: What are the organization's strengths & weaknesses? What external opportunities might move the organization or program forward or hold the organization back?	Strategic planning texts are available in public and academic libraries as well as websites such as <a href="http://www.allianceonline.org">www.allianceonline.org</a> that provide examples and guidance on how to conduct a SWOT analysis.
		Interview program or clinic staff to gather their perceptions of their program or clinics strengths and weaknesses as well as opportunities and threats.	

**Objective C: Non-HA trainees will be able to articulate program goals and objectives that accelerate organizational movement toward achievement of the organization’s strategic mission, vision and positioning strategies.**

<p>1. Competency: Ability to draft program “goals” and “objectives” that are aligned with the organization’s strategic plan and can serve as the plan of action for what the organization intends to "do" for children and youth with neurodevelopmental disabilities and their families over the next few years.</p>		<p>In small groups, students could review their organization’s or clinic’s strategic plan and then work together in drafting program goals and objectives for an organization’s neurodevelopmental disabilities program or projects that are aligned with their organization’s or clinic’s long-term strategic direction.</p>	<p>Strategic planning texts are available in public and academic libraries as well as websites such that provide examples and guidance on how to write goals and objectives. For more information on the basics of strategic planning see:  <a href="http://www.allianceonline.org/FAQ/strategic_planning/how_do_we_increase_our_faq">http://www.allianceonline.org/FAQ/strategic_planning/how_do_we_increase_our_faq</a></p>
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**Strategic Planning Questions:**

1. What is strategic planning?
2. What are the key concepts and definitions in strategic planning?
3. What are the basic steps in the strategic planning process?
4. What is a mission statement?
5. What is a vision statement?
6. What is a situation (SWOT) assessment?
7. How do you develop goals and objectives for an implementation plan?

**Health Care Strategic Planning Text Book:**

Swayne, L. E., Duncan, W. J., and Ginter, P. M. Strategic Management of Health Care Organizations, fifth editions. Malden, MA: Blackwell Publishing.

<h2 style="margin: 0;">MARKETING</h2> <p style="margin: 0;"><i>Goal: To enhance non-Health Administration trainees' understanding of and ability to participate in the development of marketing plans and initiatives for organizations that meet the needs of children and youth with neurodevelopmental disabilities and their families.</i></p>	<b>DATE COMPLETED</b>
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COMPETENCY OBJECTIVES	✓	SUGGESTED LEARNING ACTIVITIES	COMMENTS
<b>Objective A: All non-HA trainees will be acquainted with the basics of Marketing, including the Marketing Mix (e.g., the 4 P's), and the concepts of Positioning, Segmentation, Target Market and Social Marketing.</b>			
1. Competency: Knowledge of the basic concepts and definition of the Marketing Mix (e.g., the 4 P's: product, price, place and promotion), Positioning, Segmentation, Target Market and Social Marketing.		The HA discipline advisor or HA trainee should instruct the non-HA trainees using the marketing related case studies and other learning materials.	For more information on the basics of marketing see: <a href="http://www.allianceonline.org/FAQ/marketing/">http://www.allianceonline.org/FAQ/marketing/</a> .  Students could be directed to a number of basic business or health care marketing materials.
2. Competency: Knowledge of why marketing is relevant and necessary in non-profit and health care organizations.		The non-HA trainees should be instructed and directed by the HA discipline advisor and/or HA trainee to examples of materials reflecting marketing in non-profit or health care settings.  This should stimulate the trainees to reflect on marketing efforts in their own organization and to recognize the implications of passive vs. active marketing in their programs for children and youth with neurodevelopmental disabilities.	Students could be directed to a number of health care organizations websites.  For more information on the basics of marketing see <a href="http://www.marketingpower.com">http://www.marketingpower.com</a> , and note the link on the left for "Learn". Under "articles and Reports" trainees can click through to Health Care.

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

<p>1. Competency: Ability to work with a clinic or program director to identify a marketing effort and understand its purpose.</p>		<p>The trainees should work with a clinic or program director to identify a specific marketing activity on which the student should focus. The trainee should be clear on the intent of the marketing effort and the target for this effort.</p>	<p>Learning to identify marketing efforts and to elicit marketing information from non-marketing users is a key skill.</p>
<p>2. Competency: Ability to assess a marketing effort for ability to meet its goals, consistency of message, appropriate coding and decoding, and suitable reach and frequency (if applicable).</p>		<p>Having understood the intent of the effort (Objective B1), the trainee should assess how well the effort meets this objective.</p> <p>The trainee should assess the effort's consistency of message, appropriate coding and decoding, and suitable reach and frequency (if applicable).</p>	<p>Marketing efforts may be well executed but not suited to the original task. The trainee may 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).</p>

**Objective C: Non-HA trainees will be able to participate in a marketing-related discussion at a LEND-related clinic, program or support organization (e.g., a marketing plan, an outreach effort, a pricing policy etc.). While Objective B directed the trainee to evaluate an existing marketing effort this Objective involves the student in the creation of a new marketing effort.**

<p>1. Competency: Ability to work with a team on a marketing-related effort.</p>	<p>The trainee should be clear on the intent of the marketing effort and the target for this effort. Working closely with the HA coordinator or HA trainee, the non-HA trainee should generate a plan clearly outlining his/her responsibilities and goals for this team participation. The HA coordinator or HA trainee should assess the work at the end for meeting the stated goals of non-HA trainee as well as his/her contribution to the organization.</p>	
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# 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
<b><u>Objective A:</u> All trainees can describe the components of operations in the health care environment</b>			
1. Competency: All trainees will be able to list examples of operational aspects related to clinic function.		All trainees will be exposed to aspects of operations via class lectures and case discussions.	

**Objective B: All trainees can describe the role of operations analysis in interdisciplinary clinical environments when serving children with special health needs**

<p>1. Competency: All trainees have an awareness of the complexity of needs to be addressed within the array of special needs children.</p>		<p>All trainees read <i>Meeting the Needs of the Developmentally Disabled: How Doctors Offer Treatment</i>. View article at <a href="http://www.ama-assn.org/amednews/2004/08/02/hlsa0802.htm">http://www.ama-assn.org/amednews/2004/08/02/hlsa0802.htm</a></p> <p>All trainees will be able to identify clinic operations needing special accommodations for persons with disabilities</p>	
<p>2. Competency: All trainees will be able to identify the environmental factors that challenge providing adequate and safe access to specialty clinical care for 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>All trainees will be able to identify clinic operations needing special accommodations for persons with disabilities</p>	
		<p>All trainees will be exposed to ADA Training on building access and full access to services delivered within a business via class lectures.</p>	



**Objective C: All trainees will be able to assist a LEND clinic/program/organization in the design of an operations analysis to improve quality.**

<p>1. Competency: All trainees will know principles of evidence-based medicine and best practices and how to retrieve information on diagnosis and treatment guidelines for children with neurodevelopmental disabilities.</p>		<p>Critique literature on evidenced-based practices for children with neurodevelopmental disabilities and present in class. See <a href="http://www.ahrq.gov/chttoolbx">www.ahrq.gov/chttoolbx</a> for guidelines.</p>	
<p>2. Competency: All trainees will be able to describe principles and methods of various approaches to continuous performance improvement.</p>		<p>Given a case discussion all trainees will be able to suggest appropriate CQI methods. See <a href="http://www.ahrq.gov/chttoolbx">www.ahrq.gov/chttoolbx</a></p>	<p>Examples include root cause analysis, rapid cycle quality improvement, total quality management.</p>
<p>3. Competency: All trainees will be able to list measurement and monitoring techniques for care processes and outcomes related to quality improvement efforts in neurodevelopmental clinics.</p>		<p>Given a case discussion all trainees will be able to suggest outcomes and design tools to measure outcomes (or use validated measures) that address both patient and provider goals of quality improvement efforts.</p>	<p>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>Goal: To enhance the non-Health Administration trainees' understanding of financial management for services and supports to children and youth with neurodevelopmental disabilities and their families.</i></p>	<b>DATE COMPLETED</b>
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COMPETENCY OBJECTIVES	✓	SUGGESTED LEARNING ACTIVITIES	COMMENTS
<b>Objective A: All non-HA trainees will be acquainted with the basics of financial management, including budget cost accounting and financial analysis.</b>			
1. Competency: Knowledge of the basics of Financial Accounting/Financial Management.		The non-HA trainee will read the Finance Overview.	Non-HA trainee can meet with HA trainee or discipline coordinator to discuss the Finance Overview.
2. Competency: Ability to name and compare reimbursement mechanisms for health care delivery.		Discussion of case study will include a comparison of and rationale for a specific reimbursement model in the proposed clinical service.	Non-HA trainee can interview the practice manager regarding contracting specifics.
3. Competency: Ability to name and define the players in the health care industry.		The non-HA trainee will read the Finance Overview.	Non-HA trainee can meet with HA trainee or discipline coordinator to discuss Finance Overview.

**Objective B: LEND non- HA trainees will be familiar with the unique financial challenges and implications of operating an interdisciplinary CSHCN clinic.**

<p>1. Competency: Ability to describe the cost structure of a CSHCN clinical service and explain the impact that the interdisciplinary team has on the clinic's bottom line.</p>		<p>The trainee should interview a CSHCN clinic director to discuss factors that influence the direct application of business principles in CSHCN clinics, such as needing to provide Federally mandated services even when income does not meet expenses.</p>	<p>Non-HA trainee can meet with HA trainee or discipline coordinator to review principles and practices articulated by the clinic director.</p>
<p>2. Competency: Ability to describe the benefit of employing fiscal controls in health care organizations.</p>		<p>The trainee should meet with a CSHCN clinic director to discuss alternative accounting and financing strategies to compensate for expensive, poorly reimbursed services.</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>

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

<p>1. Competency: Ability to describe the budget review process addressing for completeness and consistency.</p>		<p>The trainee should interview the HA discipline coordinator about the purpose of budgets and what makes for a useful or useless budget.</p>	
<p>2. Competency: Ability to complete a cost-volume-profit analysis and a break-even analysis for a proposal to hire new clinical staff position(s).</p>		<p>The trainee should review and complete the Finance and Budgeting case study.</p>	<p>This could be a group exercise in Core Course lecture led by the HA trainee.</p>

<h2 style="margin: 0;">THE BUSINESS PLAN</h2> <p style="margin: 0;"><i>The ability to apply business concepts to the development of a health industry business plan.</i></p>	<b>DATE COMPLETED</b>
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COMPETENCY OBJECTIVES	✓	SUGGESTED LEARNING ACTIVITIES	COMMENTS
<b><u>Objective A:</u> All trainees will demonstrate an understanding of business plan components</b>			
1. Competency: Knowledge of the business plan components.		All trainee/s should be exposed to the four components of a business plan: strategic planning, marketing, operations and finance/budgeting. Class discussion could be supplemented with the materials and cases on this website.	Trainees should be encouraged to discover if their organization has a business plan. These additional plans could be added to the class discussion.

<b><u>Objective B:</u> All trainees will be able to understand the role of a business plan for LEND related organizations</b>			
1. Competency: Ability to identify work efforts that benefit from the structure of developing a business plan.		The trainee/s will identify a business problem he/she has encountered.	
		The trainee/s will identify the strategic, market, operations or finance issues he/she sees in this problem.	
2. Competency: Ability to frame current problems using business vocabulary		The trainee/s will use the vocabulary of the discipline(s) of strategy, marketing, operations and finance to describe the problem he/she has encountered.	
3. Competency: Ability to frame current problem solution using the business plan structure.		The trainee/s will describe problem solutions in terms of strategy, marketing, operations and finance implications.	

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

<p>1. Competency: Ability to understand the requests an administrator may make of employees when developing a business plan.</p>		<p>Trainee/s should identify requests for data that he/she has been asked to produce and to consider how this data might now be part of a business plan.</p>	<p>If any request is current, these would be excellent to share with the class.</p>
<p>2. Competency: Ability to tailor information to be of the most use in the development of a business plan.</p>		<p>Trainee/s should consider the problem identified in B1 and B2 above and note the sort of information an administrator would need to solve this problem effectively.</p>	
		<p>Trainee/s should identify the sorts of <i>data collection</i> that would enable him/her to provide this sort of information in the future.</p>	