

**University of Pennsylvania  
The Wharton School**

**Health Care Management: Field Application Project  
HCMG 653  
Spring 2009**

**Mark V. Pauly**

Room 208, Colonial Penn Center  
Office Hours: By Appointment  
Phone: 215-898-2838  
pauly@wharton.upenn.edu

**June M. Kinney**

Room 204, Colonial Penn Center  
Office Hours: By Appointment  
Phone: 215-898-6861  
kinneyj@wharton.upenn.edu

**Ann B. Fischer**

Lecturer, Management  
Phone: 215-898-7735  
fischera@wharton.upenn.edu

**Course Description**

This course is intended to provide a field application experience as part of your overall Wharton learning experience. As such, the course has several objectives:

- To encourage you to use the mix of functional skills and tools you have learned in the fall semester.
- To take those skills and tools from their abstract presentation or artificial case study settings and use them in a real (and important) management setting in a real organization.
- To show, in way that cannot be done in the classroom, how knowledge must be adapted to fit real problems.
- To further develop your leadership and team effectiveness skills.

This course will provide a supervised experience in the art and science of a.) shaping client-defined issues in ways that make them tractable and b.) applying new ideas effectively in complex organizational settings. The field application takes the form of a consulting project, but this is not primarily a course in how to do garden-variety consulting. For those who have not had the consulting experience yet, it will, of course, provide the basics. But it will also give you experience with techniques, approaches, and coping mechanisms for problem solving in unstructured, messy, and imperfect situations, especially when you have to influence a situation by expertise and persuasion rather than having direct control over it. You will, in other words, be confronting the reality that most managers face most of the time.

## Course Structure

The project is the heart of the course, and you will be involved in helping to shape its direction and content as well as carry it out and effectively engage your clients with your findings. The course is structured to maximize your learning about both the content of the project itself and about how to work effectively in a project-oriented environment. The most important elements of the course structure are:

- 1) A “tutorial” approach to your team’s initial work plan development, problem diagnosis and problem solving, management of client-team and within-team issues, and final presentations.
- 2) Use of course instructors and mentors. Each team will have access to two faculty members—one a member of the course faculty and the other a mentor, a faculty member with expertise on the specific problem around which the project is built.
- 3) An introductory class session designed to orient you to the course, the work, and our expectations and to prepare you for the on-campus workshop.
- 4) An on-campus workshop with the clients to launch the projects.
- 5) A tutorial with your course instructor and mentor to debrief on the client workshop and to begin to prepare the Client Engagement Memorandum. All team members must attend.
- 6) Preparation of a Client Engagement Memorandum that will lay out the Scope of Work, Resources Required, Time Frame, and Deliverables. Each team will add a confidential note to the faculty that the client will not see that flags your hunches about possible hidden agendas, difficulties you think you may encounter in executing the project, and what resources you think you will need to successfully complete the project within the time frame.
- 7) A tutorial with your course instructor and mentor to review progress on the project. All team members must attend.
- 8) Preparation of a summary of progress and issues encountered, if any, for course instructors. (Post on webCafé in faculty folder for your team).
- 9) A “dry-run” of your project presentation to your client that will be video-taped and will be critiqued on style and content.
- 10) Presentation of the project report to the client.
- 11) Individual or group memo on teaching case.
- 12) Faculty debriefing across the experience of all teams.

## **Grading**

Faculty evaluation of project – analytical quality, management of client, and feasibility.	45%
Faculty evaluation of teaching case memo	20%
Teammate Evaluation of individual performance	10%
Client evaluation of overall team performance	25%

## **Summary of Written Assignments**

Client engagement memorandum, with addendum for the faculty only (group)  
Post progress reports on webCafé in faculty folder (group)  
Presentation deck and consultant's report (group)  
Individual/group teaching case memo

## **Project Presentation**

The presentation to the client is an important step in the FAP (though it is not the culmination of the course). The team will arrange to engage the client in the team's findings and recommendations. The team should consult with the client contact about which members of the client organization should be present to receive the presentation and interact with the team about implementation. The earlier that the team and client can set the date for this working session, the more likely the client can have relevant stakeholders present for the meeting. **All teams should schedule their final presentation to the client between April 7<sup>th</sup> and April 21<sup>st</sup>.** It is advisable that teams discuss this time frame in the initial meeting with the client and develop work plans accordingly. If possible, these presentations should be made at the client site. Try to schedule on a Friday so as not to miss other classes.

The **Videotape and Feedback Sessions** scheduled for **March 25, 30, 31, April 6, 7, and 8<sup>th</sup>** are designed as client practice presentations. Ann Fischer, a communications expert who has worked with us in the course for several years, will tape the presentations and give immediate feedback on communications issues.

## **INDIVIDUAL/GROUP WRITING ASSIGNMENT**

Write a memo of 3 to 5 pages identifying some element from your project that could form the core of a teaching case for future students in other Wharton or HCM courses. The memo should describe what you regard as an important but puzzling aspect of the project and indicate what important message could be delivered by consideration of it in a case study format. **You may complete this assignment as an individual, as a subgroup of the team, or as a team.**

Possible aspects of the project that would be legitimate topics for a case might include:

- 1) The initial problem posed by the client, what the options were, and how it probably would have been addressed in the absence of your consulting findings.
- 2) How the main substantive message from your project might be viewed by your client, and how you think it will or should be used going forward.
- 3) Some aspect of the process of client-team interaction, exemplified by specific project but potentially of much more general relevance. Here again the case would describe how the particular issue emerged in context and what the choices were about following through.

You need not write up a full case with all of the relevant data, but your memo should outline the important descriptive elements that provided the context which generated the issue, indicate in the specific application what were the choices managers or team members faced, and hint at the generalizeable messages associated with particular choices. What is the main general point the case is trying to make? Your case might be one in which, behind the scenes, you really have an idea of what was the best strategy or choice, or it might exemplify a range of possible choices with varying levels of risk, ability to achieve different goals, and different long term rewards.

### **Course Outline**

**January 7 (Wednesday)**    **Full class session:** 4:30PM to 6:00PM in G55 Huntsman: Overview of course structure, and preparation for January 8<sup>th</sup> on campus workshop with clients. Barry Frankel, Managing Director of the Frankel Group, will present a session on effective consulting practices.

**January 8 (Thursday)**    **Workshop with Clients:** 5:00PM to 8:00PM. Clients will come to campus for a kick-off meeting with their respective teams. All students are expected to attend.

**LOCATION:** Jon M. Huntsman Hall, 8<sup>th</sup> Floor Conference Center  
3720 Walnut Street, Philadelphia, PA 19104

**January 14** **Tutorial:** Team meeting with course instructor and mentor.  
**(Wednesday)** Presentation of ideas/brainstorms/designs. (half-hour per team).

**All sessions will be held 8:00AM-9:00AM, Noon to 1:00PM, and from 4:30PM to 8:30PM. Teams will be assigned to slots. Meetings will take place in the Faculty Lounge, Colonial Penn Center.**

**January 23 to February 6th: First Year Dedicated Interview Period.**

**February 8** **Client Engagement Memorandum and Addendum** to Faculty due.  
**(Sunday)** Post on webCafé in your team's Faculty Folder.

**Feb. 9 & 10** **Tutorial:** Discuss progress and approach to client problem.  
**(Monday or Tuesday)** Each team meets with its faculty advisor and faculty mentor for half-hour.  
**Monday, 8:00AM to 9:00AM, Noon to 1:00PM, and 6:00PM to 8:00PM**  
**Tuesday, 8:00AM to 9:00AM, Noon to 1:00PM, and 4:30PM to 7:00PM**  
Teams will be assigned to slots.

**March 2 & 3** **Tutorial:** Discuss progress and approach to client problem.  
**(Monday or Tuesday)** Each team meets with its faculty advisor and faculty mentor for half-hour.  
**Monday, 8:00AM to 9:00AM, Noon to 1:00PM, and 6:00PM to 8:00PM**  
**Tuesday, 8:00AM to 9:00AM, Noon to 1:00PM, and 4:30PM to 7:00PM**  
Teams will be assigned to slots.

**Spring Break Week: Friday March 6 to Monday, March 16.**

**Videotape and Feedback Sessions with Ann Fischer**

Each team will schedule a two-hour time slot that includes a 30 minute practice client presentation and 15 minutes of questions/answers, followed by 15 minutes of faculty feedback and 60 minutes of communications instructor feedback (including video playback). (Sign-up on webCafé):

March 25 (Wednesday) 4:30PM to 6:30PM and 7:00PM to 9:00PM JMHH 345  
March 30 (Monday) 4:30PM to 6:30PM and 7:00PM to 9:00PM JMHH 345  
March 31 (Tuesday) 4:30PM to 6:30PM and 7:00PM to 9:00PM JMHH 350  
April 6th (Monday) 4:30PM to 6:30PM and 7:00PM to 9:00PM JMHH 345  
April 7th (Tuesday) 4:30PM to 6:30PM and 7:00PM to 9:00PM JMHH 350  
April 8<sup>th</sup> (Wednesday) 4:30PM to 6:30PM and 7:00PM to 9:00PM JMHH 345

**April 7<sup>th</sup> – April 21st TEAM SHOULD SCHEDULE ON-SITE PRESENTATIONS TO CLIENTS DURING THIS PERIOD.**

**April 21st Teaching Case Memo Due**

**April 22<sup>nd</sup>**

We will have a wrap-up class on **Wednesday, April 22nd, 4:30PM to 6:30PM, Huntsman 245**. At this class each team will be asked to spend ten minutes discussing the mini-case that they have developed. If there is more than one case from each of the 11 teams we will allocate time accordingly. We will also distribute the “intra team” evaluation forms to be completed on each team member and handed in at a later date. Also the course evaluations to be completed in class. **Everyone is expected to attend this final class.**