



Wharton Health Care Management HCMG – 855

An MBA Mini-Course “Management of Health Care for the Elderly” Fall 2016 JMHH 370

This course is designed to provide students with an appreciation of the many issues surrounding care of the elderly in America. The past, present and future of caring for one of this nation’s greatest resources, the elderly, will be explored. Specific programs and services along the continuum of care will be examined with particular emphasis on nursing homes, senior housing, community based services and the use of acute care services. The new explosion of technological devices expanding care opportunities will also be reviewed as well as the impact of pharmaceuticals, home health care, hospice care, adult day care, managed care, case management, and the use of nurse practitioners. Long-term care insurance and the changing reimbursement models for will be discussed. The ongoing malpractice crisis in the long-term care industry will also be addressed as well as the realities of current “end of life” practices in America. In true Wharton style, the final class of the semester will offer a detailed discussion of entrepreneurial opportunities within the senior market with participation from several outside entrepreneurs to respond to opportunities raised by students. This final class will be open to all Wharton students.

Course objectives are:

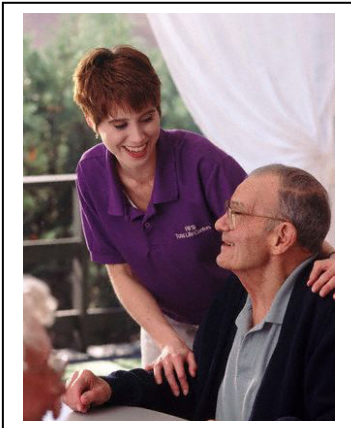
- **To enlighten students as to the complexities of and the significance of caring for our nation’s elderly within our overall health care system.**
- **To present students with the current and future challenges facing our healthcare system with respect to the elderly, especially the reality of its complex, interdisciplinary, and financially demanding characteristics.**
- **To provide students with a wide range of entrepreneurial opportunities surrounding the senior market both here in America and from a global perspective.**
- **To provide students an opportunity to investigate a specific area of interest, selected by the student and approved by the instructor and involves some aspect of senior care.**

This course is designed to provide students with the real story as it relates to care of the elderly in America. To assure learning opportunity that goes beyond the traditional “academic learning experience” a number of classes will be held off campus at local nursing and senior housing facilities. Students will have a firsthand experience to visit facilities, talk to senior residents and staff and gain a more realistic picture of the true nature of various senior care facilities. In addition, outside speakers will be incorporated into many of the weekly classes.

Instructor: John Whitman, MBA, NFA
484-557-6980
jwhitman@wharton.upenn.edu
jjw19006@aol.com

Readings: Selected materials provided by the instructor however students are expected to find materials of relevance for each class as well as to their area of interest through independent research

Weekly Assignments: Because healthcare of the elderly encompasses so many different constituents, students will be asked to view each week’s area of focus from one of several different viewpoints including:



- ❑ Providers
- ❑ Consumers
- ❑ Government (regulatory)
- ❑ Legal
- ❑ Entrepreneurial

Students will prepare for each week’s class with special focus on the area in which they selected or were assigned. (I.e. legal, consumer, provider, etc)

Course Requirements: Attendance, participation, preparation and final course project will be the areas in which final grades will be determined. Each student will be required to identify and submit at least two current articles, studies or reports related to the research project they select. In addition, each student is required to submit two jokes or comics focused on seniors. Please include the source of these materials.

Site Visits: To enhance the student’s opportunity to learn, several classes will be held on location at local nursing homes, senior housing facilities., etc. Attendance at these site visits is important to appreciate the full scope of the course. If you are unable to attend, please contact the instructor in advance so that alternate arrangements can be made to secure an independent onsite experience.

Classroom: All classes held on campus will take place in Room JMHH 370
Please look at the syllabus each week to assure you are at the right location (site visit or class room)

***Wharton Health Care Management
HCMG – 855
An MBA Mini-Course
“Management of Health Care for the Elderly”
Fall 2016***



***Class #1 (September 12, 2016),
6:00 to 9:00 PM
Huntsman Hall 370***

Introduction/Overview

***Class #2 (September 19, 2016)
6:15 to 9:00 PM
Kersley Retirement Community
2100 North 49th Street
Philadelphia, PA 19131***

***The Nursing Home Industry
(Site Visit)***

***Class #3 (September 26, 2016)
6:15 to 9:00 PM
Penn Center for Rehabilitation
36th & Chestnut Street
Philadelphia, PA 19103***

***Nursing Home & Senior Housing
(Site Visit)***

***Class #4 (October 3, 2016)
UPENN LIFE (PACE Program)
4508 Chestnut Street
Philadelphia, PA 19139-3608
6:15 to 9:00 PM***

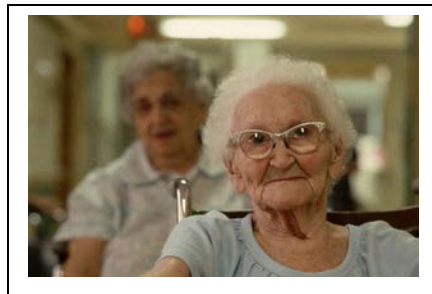
***The Nursing Home Industry
Alternatives to Consider
(Site Visit)***

***Class #5 (October 10, 2016)
6:15 to 9:00 PM
Watermark at Logan Square
Two Franklin Town Blvd
Philadelphia, PA 191035***

***High End Retirement Community
(Site Visit)***

***Class #6 (October 12, 2016)
Note: Wednesday Evening
6:00 to 9:00 PM
Huntsman Hall Room 370***

***Community Based Aging Service:
This class will examine a wide variety of
community based services essential for
seniors to remain in the community***



Class #7 (October 12, 2016)
Class #7 (October 17, 2016)
 6:00 to 9:00 PM
 Huntsman Room 370

**Entrepreneurial Opportunities to serve
the senior market**

Class #1 Introduction / Overview

JMHH 370 – 9/12/16

This first class will provide the basic overview of the realities of “Aging in America,” and the Long Term Care Continuum and how it has changed over the years into today’s broad and complex array of services. Given the complexities of the American HealthCare System, this class will discuss the good, the bad, and the ugly of our current process of caring for one of our nation’s greatest resources...our senior citizens! One of the complexities of the current system is the wide range of viewpoints surrounding each issue. To emphasize this factor, students will be divided into the following categories and asked to approach future classes from that specific viewpoint. The categories are as follows:

- ❑ Providers
- ❑ Consumers
- ❑ Government (regulatory)
- ❑ Legal
- ❑ Entrepreneurial



This course has a paper requirement and the specific details and requirements of that paper will be discussed and clarified during this first class.

Class #2 The Nursing Home Industry: Kersley Retirement Community 9/19/16

This class will be held at Kersley Retirement Community in West Philadelphia, the oldest retirement community in America. It offers multiple levels of care including nursing home services, assisted and independent living.

Preparation Required: Research on the senior housing industry differentiating between independent living, assisted living and retirement communities (CCRC’s and Life Care)

Class #3 Penn Center for Rehabilitation

9/26/16

This class, held at the Penn Center for Rehabilitation and will include a tour of the facility and a discussion with a member of the management team with time for questions and answers. Immediately following the tour and discussions with management, the class will continue at the facility and discuss industry wide issues affecting the nursing home industry. With over 15,000 nursing homes and 1.6 million residents across the country, one can imagine the tremendous variations that exist within the nursing home industry.

What makes one facility better than other? What are the key quality indicators of a nursing home? As a regulator, how do you assure quality across the board? As a government reimbursement specialist, how do you assure that the right level of reimbursement is being paid for the services provided? What's the difference between non-profit and for profit facilities? Is LTC a good investment opportunity? Where is the industry going? **DO NOT BE LATE!**

Preparation required: Preliminary background research of the nursing home industry in general and specifically, Penn Center for Rehab. Be prepared to ask the administrator questions comparing his facility to the industry as a whole and his personal thoughts on key issues affecting the future of long term care and his ability to offer his residents good quality ca



Class #4 The Nursing Home Industry: Penn's LIFE Program

10/3/16



LIFE is a Program of All-Inclusive Care for the Elderly (PACE). This model of care is centered on the belief that it is better for older adults and for their families if their chronic care needs are provided in the community whenever possible. This is an innovative program in that it provides services to those who would otherwise need nursing home care while they remain in the community in their own home or the home of loved ones. It is also an attempt on the part of the government to promote best level of care at the best cost to the system. This will be an introduction to the “alternatives to” nursing home care.

Preparation required: Research the PACE Model of Care... also called The “LIFE Program” in Pennsylvania and recent changes specific to Penn’s LIFE Program.

Class #5: High End Retirement Communities: The Watermark

10/10/16

This class will be held at the Watermark Retirement Community, a high end retirement community located in Center City Philadelphia with independent, assisted living and nursing home care services available to all residents.

Preparation Required: Conduct independent research into the retirement care business in America and identify why some have been very successful and other not... Please bring to class specific examples of successes and failures....



Class #6: Community Based Aging Services

JMHH 370 9/23/16

This class will focus on non-institutional services for the elderly including home care, meals on wheels, nurse practitioner services, and a host of other health and social services allowing seniors to live in their homes as long as possible.

Preparation Required: In preparation for this class, students will be divided into small groups each researching one of the topics above and present to the class their findings including a complete definition of the service, the size of the service within the industry, regulatory and reimbursement considerations and a conclusion as to its relative contribution to caring for our nation's seniors in a quality and cost effective manner. Recommendations for improvement will also be required.

Class #7 *Entrepreneurial Opportunities in Serving the Senior Market and The Future of Long Term Care.*

JMHH 370 10/17/16

This final class will be open to the entire Wharton School and focus on the concept of entrepreneurial opportunities in serving the many needs of the senior market. The senior market represents a broad array of entrepreneurial opportunities beyond health care. With more disposable income than any other age group, seniors represent a significant target market for many new and expanded business ideas covering almost any category one can imagine. Three experienced entrepreneurial guests will participate in a panel discussing their views on entrepreneurial opportunities in serving the elderly but more importantly respond to your thoughts, ideas and questions as a class participant. This is a wonderful opportunity to discuss ideas and concepts that have been floating in your mind!

Preparation Required: Each student will come to this final class with an entrepreneurial idea in mind and be prepared to discuss the concept with the class and the panel of experts. This class will be open to any Wharton Student interested in attending.



***Wharton Health Care Management
HCMG – 855
An MBA Mini-Course
“Management of Health Care for the Elderly”
Fall 2016***

Course Requirements:

The primary requirements of this course are class attendance, participation, and a research paper evaluating a specific aspect of the long-term care industry in which the student has interest. Each project is required to have the following components:

Step One: Identification and Approval of Research Topic or Business Plan

Each student will identify an area within the long-term care continuum in which they have some interest. The student will then create a research topic and discuss his/her topic and proposed research methodology with the instructor for final approval. The purpose of this research is to give the student an opportunity to evaluate a component of the long-term care system in which they have interest. Topics in which the student already has a significant knowledgebase will not be approved.

Step #2: Background Research:

Literature search on the selected topic is required to secure a solid base of understanding of the selected research topic.

Step #3: Research

Based on the project selected, the third step will include either interviews, creation of a business model, surveys or whatever level of evaluation needed to allow the student to complete a project with the level of detail expected from a graduate level at Wharton. All surveys should be reviewed and approved by the instructor before being distributed.

Step #4 Conclusions and Recommendations:

Students will develop a response to their research question based on their background review and individual research. Specific recommendations or conclusions from their perspective that respond to the initial research topic must be provided and supported.

Papers should be approximately 12 to 15 pages or follow a business plan format if the student selects a project concluding with the creation of a business plan. Graphs and other visuals are encouraged whenever possible to enhance the understanding of the information being presented.

There is no exam for this mini course however; papers are due by December 20, 2015. Papers should be submitted electronically if possible. If a particular paper contains support information that cannot be emailed, please mail the paper and materials to:

John Whitman
105 Thatcher Court
North Wales, PA 19454

Note: *Each student is required to email the instructor by end of the day Friday, September 16th with their desired research topic and research approach.* This should be no more than one page. Please use the attached format at the end of this document for submitting this email.

For those reviewing this material and with questions before class, please email the instructor or ask for an appointment Monday's before class. Appointments are available on September 12th, prior to class.

Group projects are encouraged b however, the depth of the research effort will need to be expanded beyond the expectations of a single student project.

In addition, it is each student's responsibility to assure that their final paper was received by the instructor. If you do not receive an email confirmation of receipt by the instructor within two days of submission, please contact the instructor directly to assure receipt.

Any papers received after December 20th will be graded as an incomplete. Once the paper is submitted, the incomplete grade will be replaced with the actual grade received.

PLEASE NOTE: Because of University grading requirements, it is important to follow the steps outlined above and follow the format outlined. Grades for papers varying from the required format will be impacted. Please contact the instructor directly with any questions.



*Wharton Health Care Management
HCMG – 855
An MBA Mini-Course
“Management of Health Care for the Elderly”
Fall 2016*

Desired Research Topic
Submission Sheet

Name: _____ Email _____

Names and email address of additional team members:

_____	_____
_____	_____
_____	_____

Desired Research Title/Topic:

Description of Research:

Approach to be used:

Date submitted: _____