University of Pennsylvania
The Wharton School

Health Care Management: Field Application Project
HCMG 653
Spring 2021

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
Phone: 609-654-4882 (h)
annbfischer@outlook.com

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 ways 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 mentors—one a member of the course faculty and the other a faculty member or someone in our network 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) Each team will set up a virtual meeting with the clients to launch the projects.

5) A tutorial with your course instructors to debrief the first meeting with the client 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. <u>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.</u>

7) Two additional tutorials later in the term with your course instructors 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. (Upload on ***Canvas*** for your team).

9) A "dry-run" of your project presentation to your client that will be videotaped and will be critiqued on style and content by Ann Fischer and the course faculty.

10) Presentation of the project report to the client.

11) Team memo reflecting on your evaluation of how the engagement should have been managed.

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 team 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.
- Upload team progress reports on ***Canvas***.
- Presentation deck and consultant's report.
- Reflective team 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 12th and April 23rd.** It is advisable that teams discuss this time frame in the initial meeting with the client and develop work plans accordingly. It is likely that these presentations to the client will have to be done virtually.

The **FAP Client Practice Presentations Sessions** will be scheduled for April 5th thru April 20th and are designed as client practice presentations. Ann Fischer, a communications expert who has worked with us in the course will provide immediate feedback and offer direction on communicating your findings and recommendations to your client.

<u>TEAM WRITING ASSIGNMENT</u>

This year we would like to ask you to write a reflective paper (3-5 pages double-spaced) on *how the client managed the consulting engagement*, but to do so from what you think was or should have been the *client's perspective*. In other words, discuss thoughtfully what you would have done if, some years from now, you are in the client's position, having both the goals and the constraints to which, in your understanding, the client was subject. You should not discuss this from the consulting team's perspective—whether this was a "good client" or "good project" or whether the client met your deadlines or expectations--but rather try to identify unavoidable constraints and behaviors from the client's side that influenced the outcome of the project. Ideally the things you identify can be put in the broader context of things clients could do or could not do that help to get the most out of the use of consultants. Were there avoidable weaknesses in client framings, or behaviors or interactions with both the team and the higher-ups in the firm that would have been avoidable?

Your paper may also touch on the following issues/questions:

- Where did the idea for the project come from and was the client both convinced of its importance and comfortable having it addressed by a consulting team?
- What constrained the client—in terms of time, resources, and support within the client's firm, views or interests of others in the firm? This list both provides context for what the client would have been able to do but also can be critiqued as limiting or deficient in some ways.
- Overall, was there imprecision and uncertainty that could have been dealt with differently? Some worthy questions are inherently ambiguous and vague, at least at the start, but the process should move toward limiting and sharpening them.
- When writing this paper try as hard as you can to write in the "voice of the advisor to the client" rather than the voice of a student team discussing their experience in the project from the perspective of the team.

Schedule, Spring 2021
Course Outline

January 21 — **Full class session, Virtual Format:** 9:00AM to 10:30AM, Overview of course structure and preparation for individual team meetings with clients. Lecture by Sidnee Pinho, COO of ClearView Healthcare Partners on "Best Practices In Consulting."

January 21 &22 — **Teams should schedule virtual meetings with clients during these days.**

Jan. 26, 27, or 28 — **Tutorial:** Team meeting with course instructors. Debrief of client meeting. Discussion of project focus, scope and supporting re. (half-hour per team).Upload brief progress report on ***Canvas*** 24 hours before your Tutorial meeting.

Tuesday Jan. 26 — **All sessions will be held 8:30AM to 10:30AM, and 12PM to 1:00PM. Meetings will take place online.**

Weds. Jan. 27 — **All sessions will be held 8:00AM to 9:00AM and 12 Noon to 1:00PM.**

Thurs. Jan. 28 — **All sessions will be held 8:30AM to 10:30AM and 12 Noon to 1:00PM.**

February 12 (Friday) — **Client Engagement Memorandum and Addendum to Faculty due**. Upload your team's client memo and addendum for faculty on ***Canvas***.

Feb. 16, 17 or 18 — **Tutorial:** Discuss progress and approach to client problem. Each team meets with its faculty advisors for half-hour. Upload brief progress report on ***Canvas*** 24 hours before your Tutorial meeting.

Tuesday Feb. 16 — **All sessions will be held 8:30AM to 10:30AM, and 12PM to 1:00PM. Meetings will take place online.**

Weds. Feb. 17 — **All sessions will be held 8:00AM to 9:00AM and 12 Noon to 1:00PM.**

Thurs. Feb. 18 — **All sessions will be held 8:30AM to 10:30AM and 12 Noon to 1:00PM.**

Spring Break Days: March 10 and March 11th.

March 23, 24, or 25 — **<u>Tutorial</u>:** Discuss progress and approach to client problem.

Each team meets with its faculty advisors for half-hour.
Upload brief progress report on ***Canvas*** 24 hours before your Tutorial meeting.

<u>Tuesday</u> March 23 — **All sessions will be held 8:30AM to 10:30AM, and 12PM to 1:00PM. meetings will take place online.**

<u>Weds.</u> March 24 — **All sessions will be held 8:00AM to 9:00AM and 12 Noon to 1:00PM.**

<u>Thurs.</u> March 25 — **All sessions will be held 8:30AM to 10:30AM and 12 Noon to 1:00PM.**

<u>FAP Client Practice Presentations Sessions with Ann Fischer and Faculty</u>
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. The sign-up schedule will available on **Google Docs** in March--covering an array of weekday dates in April, for 4:30-6:30 and 7:00-9:00 time slots. Teams should view their sign-up session date/time as a **<u>firm commitment</u>**.

April 9th – April 23th — **<u>TEAM SHOULD SCHEDULE ON-SITE PRESENTATIONS TO CLIENTS DURING THIS PERIOD</u>. <u>FRIDAYS ARE ENCOURAGED.</u>**

April 27th (Tuesday) — **<u>Team Reflective Memo Due</u>**
Upload on ***Canvas***

April 29th (Thursday) — We will have a wrap-up class on **<u>Thursday, April 29th, 8:30AM to 10:20AM,</u>** At this class, each team will be asked to spend ten minutes discussing its observations about their client's management of the team and project. The team group paper will form the basis for this discussion. **<u>Everyone is expected to attend this final class.</u>**

April 30th (Tuesday) — **Team** Final Report Due
Upload on *Canvas*

Please hand into the HCM office a hard copy in color of the **<u>final report that you delivered to the client</u>**, including appendices. You should also upload it on ***Canvas, Client Presentation Deck/Report.***