SPECIAL TOPICS IN MANAGEMENT: LEAN STRATEGIES IN HEALTHCARE

MGMT-7082 Section 001 - Spring Semester 2017

Time and location of class sessions as specified in Schedule*

*1st Briefing Session is 9-11 am on Thursday 19 January in Conference Room 502 Lindner Hall. All other class sessions listed in the Schedule are placeholders: most of the time you will schedule your own time with your team members and with the hospital field-sites. The only exceptions are the Mid-Project Review, the Final Presentation and the Final Project which are specified in the Course Schedule.

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Office Hours: After any class session and by appointment

NOTICE – FULL DISCLOSURE:
The availability of Lean projects in Tri-State area hospitals is an important component of MGMT 7082. Since 2009 when this course was first offered, we have always succeeded in placing every one of our Lean Teams in a hospital. However, in the unlikely event that we are unable to place your team in a hospital this Special Topics class will be converted into a research paper on Lean in the Healthcare sector focusing on topics selected by the Instructors. If you are uncomfortable with the inherent uncertainty in this course design you should drop this course immediately and register for an alternative course that is more in line with your risk appetite.

OBJECTIVES AND DESCRIPTION:
This course, delivered in the field-study format, is designed to teach participants the connection between a customer-centric business design and the performance (effectiveness and efficiency) of the business. Upon successful completion the participant in this course will be able to:
(1) Explain the linkage between customer satisfaction and the 5 wastes in the workplace,
(2) Apply the Lean System (Toyota Production System) of analysis to any business operation,
(3) Select and use the correct Lean tools in any business setting,
(4) Explain the major trends in Performance Improvement (PI) in the healthcare sector,
(5) Work through a specific PI problem from problem definition through recommendations,
(6) Design and manage a multi-disciplinary team for performance improvement

Other objectives of the seminar include:
- Make recommendations for PI with sensitivity for the cultural context
- Understand that any PI initiative is an exercise in change management.

The academic basis of the course is the applied framework of the Toyota Production System, its application in a service environment and the theoretical framework for strategy and change management.

COURSE STANDARDS:

Memo on Trends in Healthcare (Individual) 20%
Mid-Project Review Presentation (Group) 20%
Final Presentation including Peer & Mentor Evaluation (Group) 30%
Final Report (Individual) 30%
Classroom activity will include an on-line Learning Module on Lean tools, self-directed learning from the assigned textbook, and two briefing sessions. The rest of this course will consist of team meetings in which the Lean Team will go through the steps Problem Definition – Baseline Measurement – Data Collection – Root Cause Analysis – Recommendations in a 9 to 10-week period in coordination with members of the hospital staff or the healthcare organization who are assigned to the team. In the classroom as well as in Lean team meetings we will rely on open, in-depth discussions of the assigned topics. Active participation in the briefing sessions and regular attendance at all team meetings and class sessions are important determinants of the value delivered in this course as well as the grade earned by each individual course participants.

Teamwork is an important determinant of success in this course: at two points in the course all course participants, mentors and instructors will be required to evaluate the participation and contributions of all team members that they worked with. Your team’s performance in the Final Presentation and your individual performance in Peer, Mentor, and Instructor Evaluation will have weightage in determining the group-component of your Grade (see Course Standards above). This necessarily involves a significant element of subjectivity on the part of peers, mentors, and instructors. However, a rubric for each component of the Course Standards is posted on Blackboard.

Finally the hospital is considered a client in a client-consultant relationship with the Lean Teams in this course. Each course participant is expected to maintain the highest level of professionalism in terms of etiquette, dress code and professional behavior. If you engage in any behavior that, in the Instructors’ judgment, has the potential of damaging your team’s relationship with the hospital you will be asked to withdraw from teamwork and complete the rest of the course by writing a research paper on Lean in the Healthcare sector focusing on topics selected by the Instructors.

ON-LINE TUTORIALS

The Lean Tutorial “Introduction to Lean” can be accessed by clicking on the appropriate link provided under the “Readings” button of this course’s Blackboard website. Each course participant is expected to acquire the textbook (see section on Required Course Material) and complete the Lean Tutorial before the 1st Briefing Session

MEMO ON TRENDS IN HEALTHCARE

Each student is required to read 3 Harvard Business School Cases [“Cleveland Clinic: Improving the Patient Experience”, “Virginia Mason Medical Center (Abridged)” and “The Joslin Diabetes Center”] with an eye toward identifying a trend in healthcare that the business situation described in the case addresses.

Based on this set of 3 readings each student is required to write a Memo to the CEO of a local hospital explaining the three trends represented in each of the 3 cases and make recommendations to the CEO about the best way to position his / her hospital for this trend.

No binders or folders, simply staple your memo in the top left corner and have a cover sheet with “Memo on Trends in Healthcare 2016”, your name, MGMT7082 and Spring 2016 on it. The page limit for this memo is 5 pages (not counting the cover sheet or any appendices containing
In Spring Semester 2017 the Memo is due by the end of the day on Monday 17 April 2017. Late submissions will incur a 10% penalty in the absolute score for the Memo.

You can purchase digital or hard copy access to the 3 Harvard Business School Cases [“Cleveland Clinic: Improving the Patient Experience”, “Virginia Mason Medical Center (Abridged)” and “The Joslin Diabetes Center”] from Harvard Business School at:

http://cb.hbsp.harvard.edu/cbmp/access/58892835

You need to register on the site to create a user name if you do not already have one. Some course materials are PDF documents and you can open them with Adobe Reader. eLearning materials include a link you can use to gain access to them. Some course materials may not be available in digital format and these will be shipped to you. You will have access to the course materials for 6 months.

After you register, you can get to the coursepack at any time by doing the following:
1. Visit hbsp.harvard.edu and log in.
2. Click My Coursepacks, and then click Lean in Healthcare

COURSE DETAILS
Professor: Rajan KAMATH
Coursepack Name: Lean Strategies in Healthcare – Spring Semester 2017
Course Number: MGMT7082-001 Course Start Date: Jan 9, 2017
Course End Date: 28 April, 2017 Reference Code: 58892835
For technical assistance, please contact the Harvard Business Publishing Tech Help line at (800) 810-8858 (outside the U.S. and Canada, call 617-783-7700); or email techhelp@hbsp.harvard.edu. Business hours are 8 am - 8 pm ET, Monday-Thursday, and 8 am - 7 pm ET on Friday.

MID-PROJECT REVIEW PRESENTATION (GROUP)
Each Lean Team is required to go through a Mid-Project Review Presentation which will provide Mentors and Instructors with a status update of the project. Each team must have its Mid-Project Review checked by at least one Mentor before it is presented to the Instructors and submitted.

In Spring Semester 2017 the Mid-Project Review Presentations will be in the week of 6 Feb 2017. The tentative date for this event is 6 pm on 7 Feb 2017 and venue is Conference Room 502 Lindner Hall. Please note that all the tentative dates and venues listed in this syllabus may be modified to suit your Project Sponsor.

FINAL PRESENTATION
Each Lean Team is required to make a Final Presentation of its recommendations to the hospital. The format and template for the Final Presentation and Report will be given to you by the Instructors. Each team must have its Mid-Project Review checked by at least one Mentor before it is presented to the hospital / company and submitted as a Final Report.

In Spring Semester 2017 the Final Presentations will be in the week of 10 April 2017. The tentative date is 9 am on Thursday 13 April 2017 and the venue is Conference Room 502
Lindner Hall. Please note that all the tentative dates and venues listed in this syllabus may be modified to suit your Project Sponsor.

FINAL REPORT

Each course participant is required to submit a Final Report of the project. If your project site is in UC Health the report must be organized in sections title according to the first 6 of UC Health’s 8-Step Problem Solving Method (1.Clarify the Problem, 2.Break Down the Problem, 3.Target Setting, 4.Root Cause, 5.Develop Countermeasures, 6.Make your Plan). If your project site is in any healthcare setting other than UC Health the report must be organized in sections titled Define (in which you explain the Problem Definition), Measure (which describes the data collection you engaged in), Analyze (in which you explain your identification of the root cause), and Improve (in which you explain your recommendations for improvement). This submission will usually be in the Week 13 of the semester but it could be scheduled at another time if required by the hospital.

In Spring Semester 2017 the Final Report will be due by the end of the day on Friday 14 Apr 2017. Late submissions will incur a 10% penalty in the absolute score for the project.

PEER MENTOR & INSTRUCTOR EVALUATION (INDIVIDUAL)

Teamwork is an important determinant of success in this course: at the end of the course all course participants, mentors and instructors will be required to evaluate the participation and contributions of all team members that they worked with. A pro-forma evaluation sheet is in Attachment 1 at the end of this syllabus.

EVALUATION:

The final grade awarded will be based on the percentage of the total possible points awarded as follows:

- A = Greater than 94%
- A- = From 90 to 93.4%
- B+ = From 87 to 89.9%
- B = From 83 to 86.9%
- B- = From 80 to 82.9%
- C+ = From 77 to 79.9%
- C = From 70 to 76.9%

FEEDBACK:

A formal evaluation of the course will be requested at the end of the term. However, your comments, suggestions, and criticism are welcome at any time during the course - the earlier the better.

PREREQUISITES & DROPS:

You are expected to have successfully completed all the courses that are listed in the college bulletin as prerequisites. If you do not meet these requirements you should drop the course immediately in order to add a substitute course. If you do not voluntarily drop, you may be administratively withdrawn from the course and you may be unable to add a substitute course.

You may drop this course with a "W" before Week 7 in the semester. No drop requests will be signed after this date.
REQUIRED COURSE MATERIAL:
The required course materials are:
- 3 Harvard Business School cases: see section on “Memo” above

SUPPLEMENTARY READING:

IMPORTANT
You are expected to maintain copies of all papers and assignments that are turned in for evaluation. You are also responsible for maintaining copies of any work that is returned during the quarter. You should keep these copies until the final grades are posted.

TENTATIVE COURSE SCHEDULE:

<table>
<thead>
<tr>
<th>Session: 1</th>
<th>Date: 1/19/17</th>
<th>Thursday 9-11 am Room 502</th>
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<tbody>
<tr>
<td>Introduction, Group Formation, Preliminary Allocation of Group Work</td>
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<td>Introduction to Mentors</td>
<td>Presentation of Previous Lean Projects</td>
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<td>Intro to On-line Learning Modules</td>
<td>Preliminary Project Definitions</td>
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<td>Customer-centric business models</td>
<td>Common Accidents &amp; Process Implications</td>
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<td>Review of Rubrics</td>
<td>Scheduling Project Kick-Off (Venue &amp; Date)</td>
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<tr>
<th>Session: 2</th>
<th>Date: 1/26/17</th>
<th>Thursday 9-11 am Room 502</th>
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<tbody>
<tr>
<td>Preparation for Project Kick-Off</td>
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<tr>
<td>Project Kick-Off to be scheduled in end-January* after projects are finalized</td>
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*This date and venue may change to suit your Project Sponsor

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<tr>
<th>Session: 3</th>
<th>Date: 2/7/17</th>
<th>Tuesday 6-8 pm Room 502</th>
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<tr>
<td>Mid-Project Review* – After Mentors’ Review</td>
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*This date and venue may change to suit your Project Sponsor

Between the Mid-Project Review Presentation and the Final Presentation teams will work on the project assigned to them. The team is responsible for organizing and managing its interface with the hospital to complete the project in a timely fashion. Meetings with the instructor will be scheduled as needed.
Session: 4  Date: 4/13/17  Thursday 9-11 am Room 502
Final Presentations – After Mentors’ Review

*This date and venue may change to suit your Project Sponsor

Final Reports due at end of day 4/14/17

Memos due at end of day 4/17/17
**Attachment 1**

**Evaluation Form**

(To be filled in and turned in by all Mentors and Team Members after Mid-Project Review and after Final Presentation)

Your Name:

Team Number:

Project Description:

In my experience of this team, I believe the table below represents my evaluation of the level of participation (in meetings, field-work, project planning and presentations) of each team member:

<table>
<thead>
<tr>
<th>Team Member’s Name</th>
<th>Participation %</th>
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<tbody>
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<tr>
<td><strong>Total</strong></td>
<td><strong>100%</strong></td>
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