

COURSE INTRODUCTION

**PHC 6146
Health Services Planning**

Disclaimer!

There is very little in these course materials that is original. I have tried as much as possible to give credit for ideas and materials that have been borrowed and integrated into this course.

I even apologize in cases where materials have been borrowed and used in ways not meant by the authors.

If you notice materials you feel were not referenced adequately, please notify me at ward@health.usf.edu and I will make every effort to correct this.

WELCOME

Course modules typically consist of:

- A set of PowerPoint presentations for each course module can be found on the course website.
- A set of readings for most weeks.
- A workbook consisting of 4 exercises for the development of a business plan, the significant student activity for the course.
- The following is the class schedule for Semester.



Learning Objectives
 The course is offered in the form of lectures, group discussions, group/individual exercises, and group/individual presentations. The student is expected to:

- 1 Acquire an in-depth knowledge of the concepts, rationale and development of health services planning and evaluation. [units A, B, C]
- 2 Gain skills and knowledge on methodologies of the health services planning and evaluation process and their major tools. [units B, C, D]
- 3 Become fully oriented re information needs for community, institutional, and individual health assessment and on using quantitative and qualitative methods to enhance information. [units C, D]

Learning Objectives [cont.]

4. Achieve the ability to present the concepts and skills in an integrated fashion in a project report. [Exercises 1, 2, 3, 4]
5. Integrate the assessment and evaluation of **equity** and **ethical** delivery of services into an actual program through a series of real world activities [Exercises 1, 2, 3, 4]
6. Demonstrate planning and evaluation approaches for diverse populations within a given geographic area [units C, D, E]

Strategic & Business Planning

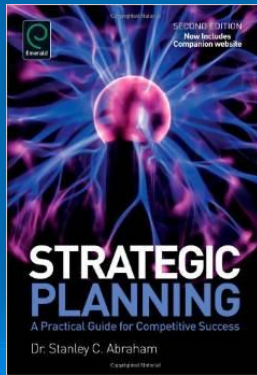
Strategic Planning Strategic Planning (sometimes called Strategic Thinking) is the higher-level component of putting together a 3-5 year plan called the Business Plan. It includes visioning, values, external competition assessment, internal appraisal, etc. [see two slides after next]

Business Planning Business Planning is the mid/lower level components of a Strategic Plan. It includes a 12-18 month mission statement, critical goal categories, marketing plans, financial plans, etc. in attaining the long-term vision developed through Strategic Planning and the focus of this course.

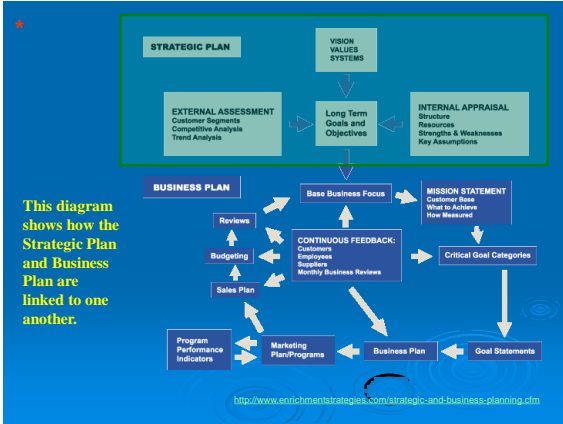
<http://www.enrichmentstrategies.com/strategic-and-business-planning.cfm>

This is a very good book in dealing with Strategic Planning but its focus is not primarily on health-related issues.

<http://www.amazon.com/Strategic-Planning-Practical-Competitive-Success/dp/1780525206>



3. STRATEGIC PLANNING AND BUSINESS PLANNING



This class can be seen as a follow-up to **PHC 6148 – Strategic Planning and Marketing for Health Care**.

Business Planning is the logical continuum of the process of assessing need for a given product or service.

The purpose of **Business Planning** is to determine the best ways to increase the efficiency and effectiveness of a business.

The next slide assumes that a business has completed/updated its business plan and that a new round of **Strategic Planning** is the next step.

Existing businesses need to do **Strategic Planning** if they have not already done so.

Some people think that just because they have created a **Business Plan**, that they have done everything required to be ready to go out there and take over the world! Not so! There are a number of things that **Strategic Plans** achieve which are distinctly different from business and **Project Plans**.

A strategic plan:

- Serves as a framework for decision making.
- Is the basis for accountability to owners, investors and shareholders.
- Forms a basis for business and project planning.
- Explains the business to others (both external and internal to the business) in such a way as to involve them in the company direction, motivate them to support it, and let them know what the strategic direction is,
- Helps with benchmarking and performance monitoring.
- Is a stimulus for change in the business, and develops the building block for future plans.

<http://www.rovermind.com/planning/strategic-planning.php>



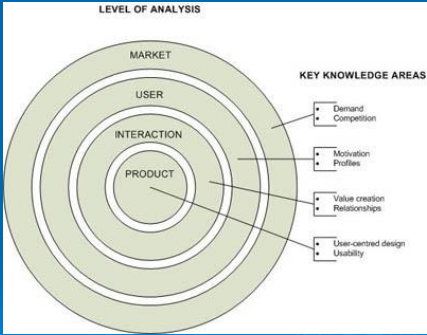
4. EVALUATION PARADIGMS

It is important to have a paradigm which looks at the interrelationships among the components for planning and evaluation.

This section looks at a few of these paradigms as examples.

The next figure should be viewed from the outside in. Rather than buying a hammer and spending the rest of the time looking for nails, it is better to see what is needed and then figure out how to build it.

This diagram looks at the impact a museum is having on attendees – both online and in person.



LEVEL OF ANALYSIS

- MARKET
- USER
- INTERACTION
- PRODUCT

KEY KNOWLEDGE AREAS

- Demand
- Competition
- Motivation
- Profiles
- Value creation
- Relationships
- User-centred design
- Usability

<http://www.archimuse.com/mx/2007/papers/peacock/peacock.html>

Terminology is important in planning and evaluation.

The next two slides look at terms used by a variety of international organizations.

If you work internationally, you will find the following chart useful in identifying planning & evaluation models. [you may have to paste the link in a browser to get it to work]

	Ultimate Impact	End Outcomes	Intermediate Outcomes	Outputs	Interventions	
Needs-based	Higher Consequence	Specific Problem	Cause	Solution	Process	Inputs
CARE terminology	Program Impact	Project Impact	Effects	Outputs	Activities	Inputs
CARE logframe	Program Goal	Project Final Goal	Intermediate Objectives	Outputs	Activities	Inputs
PC/LogFrame	Goal	Intermediate Results	Purpose	Outputs	Activities	
USAID Results Framework	Strategic Objective	Final Goal	Strategic Goal Objective	Intermediate Results	Activities	Inputs
USAID Logframe	Goal	Purpose	Outputs	Activities	Inputs	202E
DANIDA + DID	Overall goal	Project purpose	Results/Outputs	Activities	Inputs	
CIDA + GTZ	Overall Objective	Project Purpose	Results	Activities	Inputs	
European Union	Development Objective	Immediate Objectives	Outputs	Activities	Inputs	
FAO + UNDP + NORAD	Sector Objective	Goal	Project Objective	Outputs	Activities	Input/Resources
UNHCR	Long-term Objectives	Short-term Objectives	Outputs	Activities	Inputs	
World Bank	Scheme Goal	Major Development Objectives	Outputs	Activities	Inputs	
AusAID						

These are the sources for the table in the previous slide.

- [1] CARE Impact Guidelines, October 1999.
- [1] PC/LogFrame (tm) 1988-1992 TEAM technologies, Inc.
- [1] Results Oriented Assistance Sourcebook, USAID, 1998.
- [1] The Logical Framework Approach to portfolio Design, Review and Evaluation in A.I.D.: Genesis, Impact, Problems and Opportunities, CDIE, 1987.
- [1] A Guide to Appraisal, Design, Monitoring, Management and Impact Assessment of Health & Population Projects, ODA [now DFID], October 1995
- [1] Guide for the use of the Logical Framework Approach in the Management and Evaluation of CIDA's International Projects. Evaluation Division.
- [1] ZOPP in Steps, 1989.
- [1] Project Cycle Management: Integrated Approach and Logical Framework, Commission of the European Communities Evaluation Unit Methods and Instruments for Project Cycle Management, No. 1, February 1993
- [1] Project Appraisal and the Use of Project Document Formats for FAO Technical Cooperation Projects. Pre-Course Activity: Revision of Project Formulation and Assigned Reading. Staff Development Group, Personnel Division, August 1992
- [1] UNDP Policy and Program Manual.
- [1] The Logical Framework Approach (LFA). Handbook for Objectives-oriented Project Planning.
- [1] Project Planning in UNHCR: A Practical Guide to the Use of Objectives, Outputs and Indicators for UNHCR Staff and Implementing Partners. Second Ver. March 2002.
- [1] AusAID NGO Package of Information, 1998

5. RESULTS-BASED MANAGEMENT

RESULTS-BASED MANAGEMENT

The concept of **Measurable Results-based Management** is based on identifying programmatic results and feeding that information back into the planning approach.

The **RESULTS-BASED** approach is where the social and epidemiologic realities in the field determine vision and mission which then define goals, objectives, and data needs.

Service interventions are designed at this point and a **Business Plan** is developed to find resources for implementation. Some refer to this as **Strategic Management**.

The next slide is a depiction of **Strategic Profile Development**, the first step in **Strategic Planning**. This also is referred to as **internal & external environmental scanning**.

In this slide, the **Strategic Profile** can refer to a range of detailed needs assessments done to determine where to go based on changing realities, how to commence, who the competition is/are, and to what extent what was being done was working.

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    graph TD
      A[Strategic Profile] --> B[Major Expectations: Stakeholders, Topmanagement]
      A --> C[General Environmental Analysis]
      A --> D[Strategic Issues]
      B --> E[Missions Policies Goals Program Strategies]
      C --> E
      D --> E
      E --> F[Factual Plans]
      F --> G[Budgets]
      G --> H[Implementation]
      H --> I[Operational Results]
      I --> A
      I --> J[Feedback loops]
      J --> B
      J --> C
      J --> D
      J --> E
      J --> F
      J --> G
      J --> H
      J --> I
  
```

I have lost the link for the diagram.

This table helps you measure your business against competitors.

Strategic Focus <i>And customer reactions</i>	Uncompetitive <i>Behind the pack</i>	Competitive <i>In the pack</i>	Distinctive <i>Ahead of the pack</i>	Breakthrough <i>In your own pack</i>
Product Leader <i>"It costs more, but it's worth it"</i>				
Cost Leader <i>"I can't believe the value"</i>				
Convenience Leader <i>"It's all so hassle-free"</i>				
Service Leader <i>"They offer such great advice and support"</i>				
Solutions Leader <i>"It's exactly the solution I was after"</i>				

<http://www.morganross.co.uk/free-resources/step-by-step-9-card-choosing-your-strategic-focus/>

Why don't we apply these questions to organizations in which you are interested?:

- where to go based on changing realities?
- how to commence?
- who the competition is/are? and
- to what extent what was being done was working?

You may want to submit your work to this week's discussion forum.

Performance Indicators

The next slide includes a list of child-related performance indicators.

The slide uses the approach of **Benchmarking** to estimate potential improvement based on getting the lower level performers to perform at the level of some of the higher performers.

The following slide uses 4 indicator categories to monitor improvements.

USAID Log Frame

The main headings are:

- The **Project Structure**, in terms of activities, outputs, purpose and goal targets for each element of the project structure (known as Objectively Verifiable Indicators) expressed in terms of quantity, quality, time, Target group and place
- **Sources Of Information** (known as the Means of Verification) for verifying progress towards achieving the targets
- The **External Environment**, identifying factors beyond the control of the project that may affect the project's implementation and sustainability.

A blank form can be found in the next slide to begin filling in. Note that these forms should always be revisited and updated as you gain new information.

http://www.fao.org/participation/english/web_new/content_en/images/logframe_2.pdf

Project Structure	Objectively Verifiable Indicators	Means of Verification	Important Assumptions
Goal <input type="text"/>			<input type="text"/>
Purpose <input type="text"/>			
Outputs <input type="text"/>			
Activities <input type="text"/>			

http://www.fao.org/participation/english/web_new/content_en/images/logframe_2.pdf

6. STRATEGIC PLANNING

This diagram shows **Strategic Planning** as encompassing results-based management and development of a **Business Plan**.

Strategic Profiling involves external assessment and internal appraisal.

The business plan uses this information to develop an **Action Plan** and a **Budget**.

<http://www.learningworks.ca/what/sp.html>

The next slide shows a series of steps called “the Strategic Planning Process Model”.

Steps 1 – 7 are covered in PHC 6148: Strategic Healthcare Planning and Marketing

DEVELOPMENT | **IMPLEMENTATION**

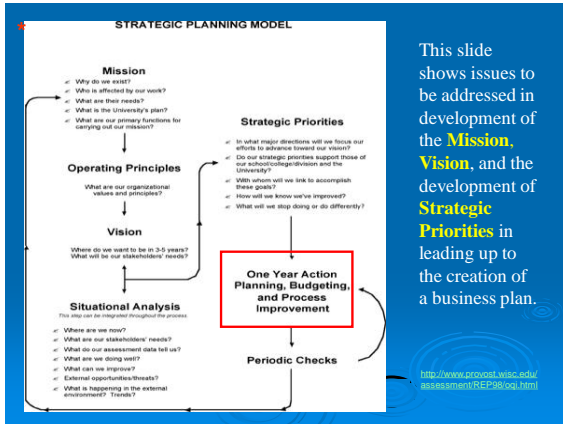
STRATEGIC PLANNING PROCESS MODEL

15 Steps: 1. Preparation and review of previous plans and results; 2. Designate strategic plan manager; 3. Conduct situational analysis and S.W.O.T.; 4. Formulate goals; 5. Define measures; 6. Create strategies; 7. Identify resources; 8. Create actions; 9. Develop implementation and communication plans; 10. Implement Plan; 11. Communicate Plan; 12. Monitor (results); 13. Ownership and accountability for outcomes; 14. Start again; 15. Adjust plan.

Checkpoints: Are they ready?, Are they adequate?, Are stars realistic, are resources available?, Were goals met?

Legend: Goals → Strategies → Actions → Results

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This slide shows issues to be addressed in development of the **Mission**, **Vision**, and the development of **Strategic Priorities** in leading up to the creation of a business plan.

Selecting Or Creating An Organization

As the business plan is the major course activity, each course participant/group will be applying these topics to a organization.

Thus, I suggest that you begin to narrow down your choices now [you can share ideas with other class members in the [Possible business plan topics discussion forum](#)].

Please contact me at phc6146@yahoo.com for help before beginning work on the business plan.

Do any of you have an idea of what organization you would like to use for your business plan? Since it is easier to plan as a group, see if you can recruit others to work with you.

The next slide shows how separate external and internal analyses can be used in completing a SWOT study.

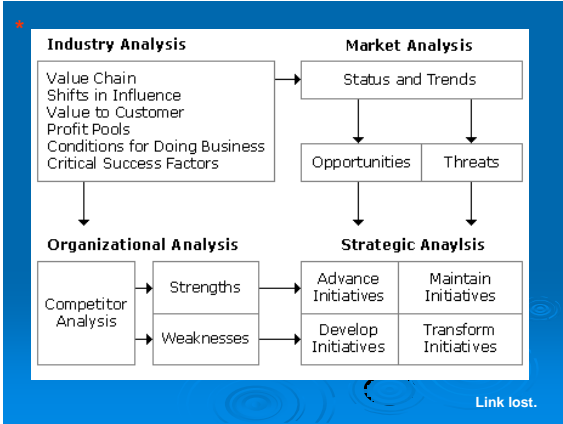
Value chain refers to the value added at each step in the development of a product or service.

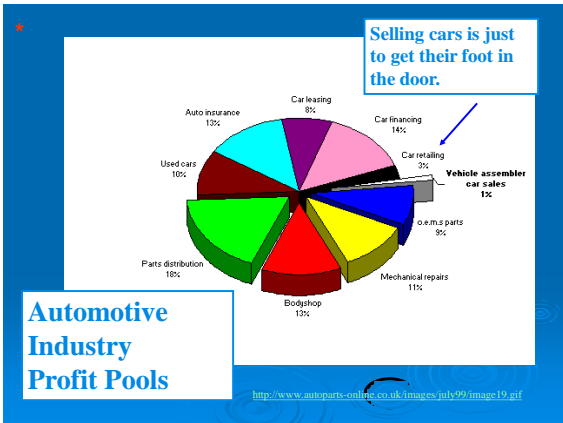
Shifts in influence relate to the control an organization has over the market for its products.

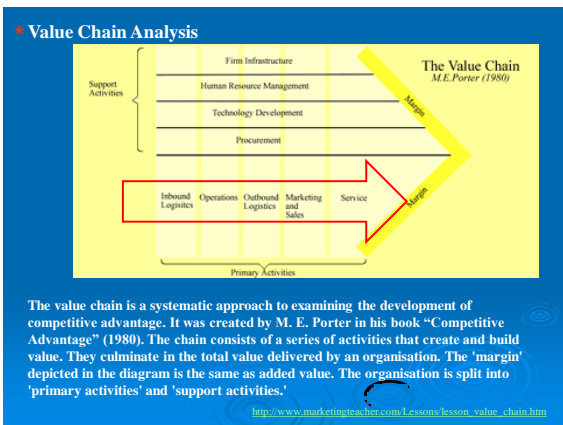
Value to the customer refers to perceived value and may be a function of brand or of meeting a need.

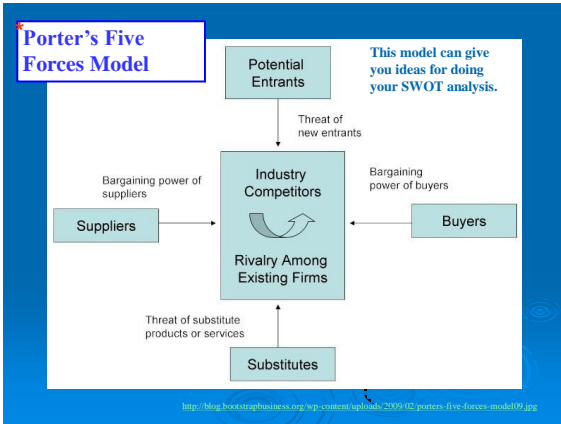
An example of **Profit Pools** for the automotive industry can be seen in the slide after next.

Critical success factors include the extent of competition, time to market, cost of inventory, quality of personnel and a whole host of similar factors.









Porter's Five Forces Model

Five Forces Analysis assumes that there are five important forces that determine competitive power in a situation. These are:

Supplier Power: Here you assess how easy it is for suppliers to drive up prices. This is driven by the number of suppliers of each key input, the uniqueness of their product or service, their strength and control over you, the cost of switching from one to another, and so on. The fewer the supplier choices you have, and the more you need suppliers' help, the more powerful your suppliers are.

Buyer Power: Here you ask yourself how easy it is for buyers to drive prices down. Again, this is driven by the number of buyers, the importance of each individual buyer to your business, the cost to them of switching from your products and services to those of someone else, and so on. If you deal with few, powerful buyers, they are often able to dictate terms to you.

http://www.mindtools.com/pages/article/newTMC_08.htm

Porter's Five Forces Model [cont.]

In Health Care, we need to look at the fact that the consumer has very little say in service purchases. Providers determine, in the main, what the consumer needs.

Competitive Rivalry: What is important here is the number and capability of your competitors – if you have many competitors, and they offer equally attractive products and services, then you'll most likely have less power in the situation. If suppliers and buyers don't get a good deal from you, they'll go elsewhere. On the other hand, if no-one else can do what you do, then you can often have tremendous strength.

Threat of Substitution: This is affected by the ability of your customers to find a different way of doing what you do – for example, if you supply a unique software product that automates an important process, people may substitute by doing the process manually or by outsourcing it. If substitution is easy and substitution is viable, then this weakens your power.

http://www.mindtools.com/pages/article/newTMC_08.htm

Porter's Five Forces Model [cont.]

Five Forces Analysis [slide after next] assumes that there are five important forces that determine competitive power in a situation.

These are:

Threat of New Entry: Power is also affected by the ability of people to enter your market. If it costs little in time or money to enter your market and compete effectively, if there are few economies of scale in place, or if you have little protection for your key technologies, then new competitors can quickly enter your market and weaken your position. If you have strong and durable barriers to entry, then you can preserve a favorable position and take fair advantage of it

http://www.mindtools.com/pages/article/newTMC_08.htm

Strategic Profile Development

The next slide provides a model for **Strategic Profile Development**

The slide after that introduces the term – **SWOT** analysis.

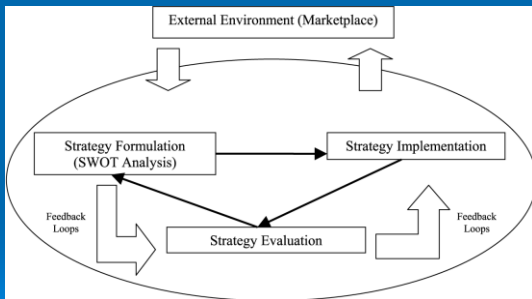
The slide after provides a matrix of SWOT components.

The slide following that lists results of a SWOT analysis for a brand-focused corporation or sector.

You will be applying a SWOT analysis to your project later in the course.

SWOT = Strengths, Weaknesses, Opportunities, Threats.

Strategic Profile Development



<http://www.emeraldinsight.com/02/330000301001.png>

* SWOT ANALYSIS



<p>STRENGTHS</p> <ul style="list-style-type: none"> • What are the strengths of your business? 	<p>WEAKNESSES</p> <ul style="list-style-type: none"> • What do you feel your business weaknesses are?
<p>OPPORTUNITIES</p> <ul style="list-style-type: none"> • What do you feel are the future areas of opportunity for your business? 	<p>THREATS</p> <ul style="list-style-type: none"> • What are your competitors currently doing?

Let's begin to fill in a matrix like this [slide after next] with regard to the organization or one of its products or services you wish to develop.

Link has been lost.

* SWOT ANALYSIS

	Positive	Negative
Internal factors	<p>Strengths</p> <ul style="list-style-type: none"> > Technological skills > Leading Brands > Distribution channels > Customer Loyalty / Relationship > Production quality > Scale > Management 	<p>Weaknesses</p> <ul style="list-style-type: none"> > Absence of important skills > Weak brands > Poor access to distribution > Low customer retention > Unreliable product / service > Sub-scale > Management
External factors	<p>Opportunities</p> <ul style="list-style-type: none"> > Changing customer tastes > Liberalisation of geographic markets > Technological advances > Changes in government politics > Lower personal taxes > Change in population age-structure > New distribution channels 	<p>Threats</p> <ul style="list-style-type: none"> > Changing customer tastes > Closing of geographic markets > Technological advances > Changes in government politics > Tax increases > Change in population age-structure > New distribution channels

http://www.tutor2u.net/business/images/swot_analysis.gif

* SWOT ANALYSIS

With an organization in mind, begin to Fill in this chart based on examples in the previous and next slides. You can submit it to the Discussion Forum.

Org/ Service:	Positive	Negative
	Strengths	Weaknesses
External Factors		
	Opportunities	Threats
Internal Factors		

STRATEGIC PLANNING

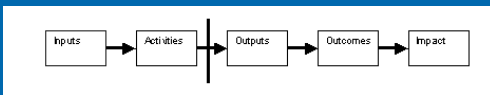
There has been a lot of press in the last few years about 'Going Global'.

As this cartoon suggests, it entails more than flags on a map.



STRATEGIC PLANNING

The graphic below indicates that **Program Impact*** is a sequential result of **Program Inputs** integrated in **Activities** designed in such a way as to maximize **Outputs** which have previously been shown in the research literature to lead to successful **Outcomes**.



* [health educators tend to reverse the outcomes and impact terms - impact meaning behavior change]

<http://www.ecampus.net/sustain/images/graph.gif>

Operational Measures

.....if I, as a store manager, am trying to measure improvements in my customer service (a strategic performance measure), it is not enough to measure how many people come through the door. If they are not buying, I need to determine why.

It will also not indicate to me whether my profits [outcomes] will improve, even if there is an increase in numbers.

However, I might want to count the number of people coming in or numbers of people at particular times to give me an indication that I need to employ more staff [inputs]. Tracking numbers of people may be useful if related to sales and to customer retention.

The previous slide shows that operational measures are used to assess performance.

The next session deals with Developing a Business Plan.

Here we will introduce the topic.



7. DEVELOPING A BUSINESS PLAN

*** DEVELOPING A BUSINESS PLAN**

The next slide identifies five elements of a business plan. This plan is one of many possible plans. Class participants should look around to find an outline that best suits their particular organization. The first element – **the Executive Report** is found at the end of the presentation under Report Writing. The other four elements are:

- a. **Description of the Business**
- b. **The Marketing Plan**
- c. **The Financial Plan**
- d. **Other Useful Information**

The course addresses these elements. As the major course activity, you will follow a similar format in developing a **Business Plan** which you could submit for funding.

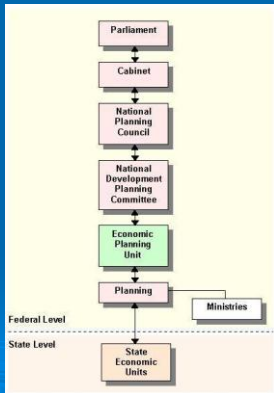
Malaysia:

Relationships between key agencies involved in planning at federal and state level

The cabinet membership is determined by the influence of parties that make up the parliament.

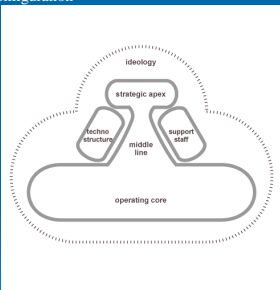
The Prime Minister will appoint the leadership of the National Planning Council based on this.

http://www.unescap.org/dpdp/vc/orientation/M4_tsk_6.htm



Mintzberg defined organisational structure as "the sum total of the ways in which it divides its labour into distinct tasks and then achieves coordination among them". Each configuration contains six components:

- **operating core**: the people directly related to the production of services or products;
- **strategic apex**: serves the needs of those people who control the organisation;
- **middle line**: the managers who connect the strategic apex with the operating core;
- **technostructure**: the analysts who design, plan, change or train the operating core;
- **support staff**: the specialists who provide support to the organisation outside of the operating core's activities;
- **ideology**: the traditions and beliefs that make the organisation unique.



<http://www.prosimobile.com/22-five-configurations/mintzberg>

Some type of organizational chart that also identifies the various stakeholders should be a part of a business plan.

Once stakeholders are identified, selected groups/individuals among them should be the ones to develop a **Vision Statement**.

Here is a characterization of stakeholders for the UK National Health Service

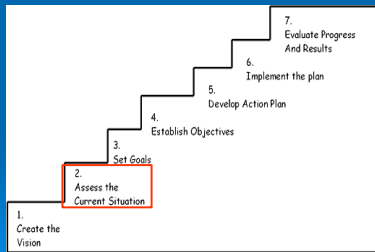
The next slide shows a set of stairs delineating what needs to be done once a Vision Statement exists.

<http://www.ppsa.nhs.uk/PASAW/eb>



Based on the above, on this slide [and in the discussion forum if you want], why don't you begin to visualize how your organization is constructed using Mintzberg's diagram?

Step 2 below is **Strategic Profiling**. By doing a SWOT analysis, we can see if the **Vision**, which came from the efforts of the **Stakeholders**, is achievable, given the state of the organization vis-a-viz its **Internal and External Environments, Skills, and Resources**.



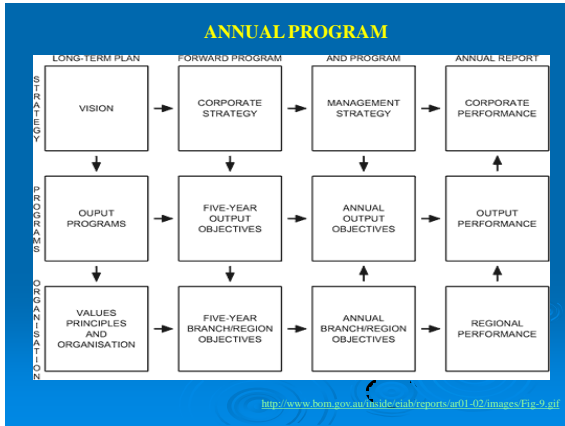
Link lost.

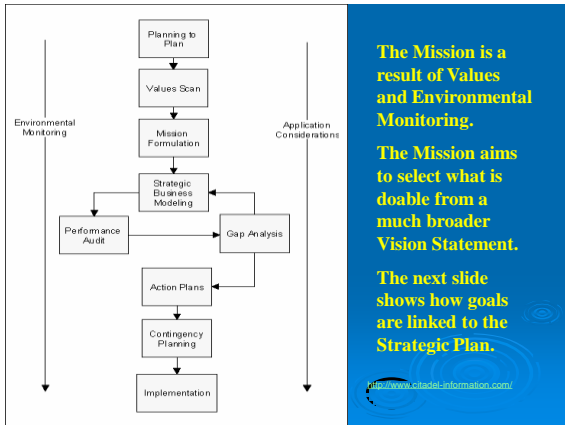
The chart in the next slide shows how **Vision** defines **Strategy** [horizontally] and **Programs** [vertically].

It shows how programs define the nature of the organization.

It also shows how outcomes are linked to reporting over time.

The slide after that shows steps in developing a **Business Plan**.





Start Here

What do you feel is missing from the following two mission statements in the next 2 slides?*

* Items in red are the focus of Canvas Discussion Forums .

When you contribute to such a discussion forum, always indicate the session from which the item comes, the slide #, and the question you are addressing. Always provide a new reference

Usually you will be able to direct your submission at the problem/program you are addressing in your business plan. In this way, you are starting to chip away at completion of your business plan.

Mission Statement of The Ministry of Health of Timor-Leste

Consistent with the vision statement, the Mission of the Ministry of Health is to strive to ensure the availability, accessibility and affordability of health services to all the people of Timor-Leste, to regulate the health sector and to promote community and stakeholders' participation (including other sectors).



http://www.searo.who.int/en/Section313/Section1526_10885.htm

http://www.jackiechen.com/attach/maas/2008/09/TI-mor-Leste_m330.jpg



GOVERNMENT OF THE REPUBLIC OF SIERRA LEONE

Ministry of Health & Sanitation

MISSION STATEMENT

To ensure that available resources (human, financial & material) are maximally utilized for the purpose of achieving the Ministry's goal, which is to provide quality, affordable and accessible health care services to the people of Sierra Leone.

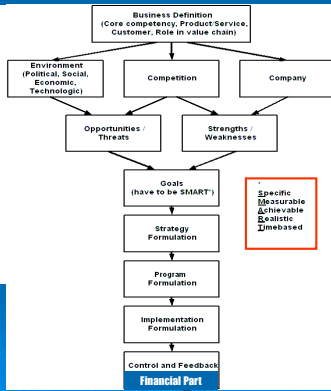
<http://www.mdg5-mashwork.org/partners/2>

Links at the bottom of the pages are used to reference materials but can be used also to find additional information.

Class members are not responsible for linked information.

The 2 following slides are from the Michigan Education Plan.

<http://www.epl1.ch>



MICHIGAN DEPARTMENT OF EDUCATION PLAN

The Plan includes an **Evaluation Process** that enables the district to monitor progress toward the **Specified Goals** and make mid-course corrections in response to new developments and opportunities as they arise.

The plan includes:

- a summary of goals met;
- a summary of unexpected outcomes;
- a summary of goals not met; and
- a plan for addressing unmet goals and objectives

The plan indicates the following:

- frequency of update;
- person(s) responsible for update; and
- an evaluation strategy (how does the district measure progress?).

<http://www.michigan.gov/nde/>

MICHIGAN DEPARTMENT OF EDUCATION PLAN [cont.]

A general description is included of the process by which the evaluation will be conducted, including who will be involved and what questions will be asked.

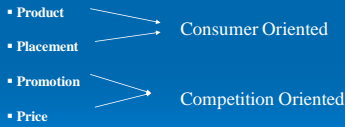
The evaluation section indicates what measures will be used and how success will be determined.

<http://www.michigan.gov/nde/>

7b. The Marketing Plan

The Marketing Plan

The Marketing Plan is a component of the overall Business Plan.
Marketing has been defined as the 4 P's



http://ocw.mit.edu/OcwWeb/Sloan_School_of_Management/15.812/Marketing-Management/Fall2002/CourseHome

The following slide represents a model for developing messages from Fire Departments.

The slide after that looks at messages for breast cancer screening action.

The model is much like those for selling products.

Gap Analysis

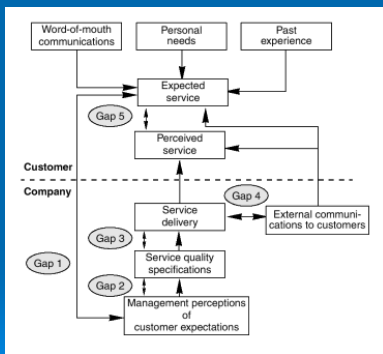
Gap Analysis is an approach that can be used at any stage of business, program, project, or activity development.

It simply means looking at what is expected [by the **stakeholders, management, providers, and consumers**] or desired and what is the actual reality.

What is interesting is that there may be very different expectations among the 4 groups identified above.

The next slide looks at steps to take in the analysis.

Gap Analysis



Link has been lost

This slide provides a complex summary of relevant marketing activity information.



Link not found

At this point, identify a product, program, or service that you might wish to promote through the organization you are thinking of selecting.* What is the organization?

Select 4 items from the previous slide that you feel might of importance in promoting the product/service/program and list them here and tell us how they will help:

- 1.
- 2.
- 3.
- 4.

Post this information on the relevant Discussion Forum in Canvas.

This chart does a good job of organizing the concepts presented earlier

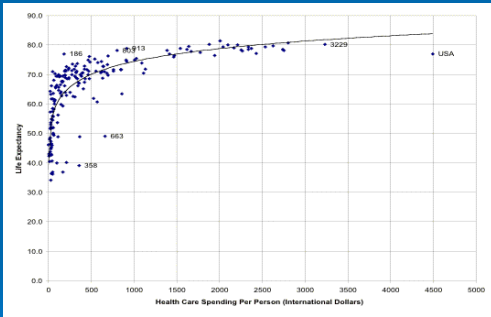
Start thinking about how your product [a clinic, a regional care system, a specific service] might benefit from similar information.



The next slide identifies 3 components in the Communications Model. There usually is a fourth component – Channels [TV, radio, face-to-face, etc].

The extent to which these components are linked **positively** or **negatively** is referred to as **Dissonance** or **Dissonance Reduction*** [leading to Concordance] and affects how communication takes place.

7c. The Financial Plan



This chart shows the range of per capita health expenditures by country. The US is near the top of the range. What appears to be the relationship?

ucatlans.ucsc.edu/health/accessprint.html

The next few slides are taken from the report below.

To see the entire report, all you have to do is click on the link at the bottom of this slide.

Japan, Ministry of Health, Labour, and Welfare Annual Reports on Health and Welfare 1998-1999 Social Security and National Life

The next slide shows how health care expenses in Japan have tripled over 19 years while Treasury expenditures only doubled. Both would be very positive in the US. The slide following that does, however, show that health care expenditures are far outrunning other government expenses.

<http://www.mhlw.go.jp/english/>

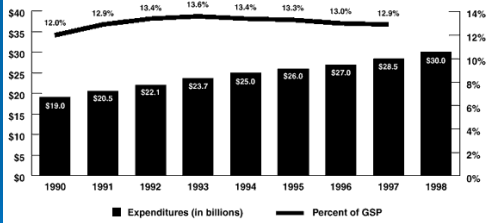
The following slide shows that health care is eating away at total Massachusetts production over time.

Do you think this was a factor in ex-Governor Mitt Romney's move to require health insurance for everyone in the State?

<http://www.kaiserhealthnews.org/stories/2012/august/02/romney-republican-candidate-on-health-care.aspx>

For Discussion Forum points, what are the long term implications?

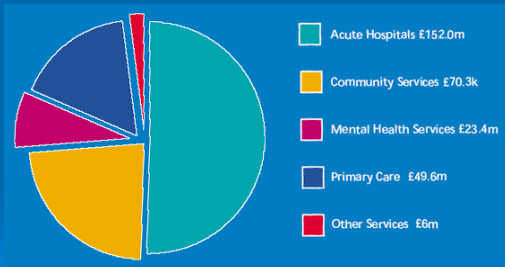
Massachusetts Health Care Expenditures and Percent of Gross State Product (1990-1998)



Source: "Massachusetts Health Expenditures, 1990-98" Health Care Financing Administration, Office of the Actuary, National Health Statistics Group, July 17, 2000; "Regional Accounts Data, Gross State Product," US Department of Commerce, Bureau of Economic Analysis, January 15, 2000, www.bea.doc.gov

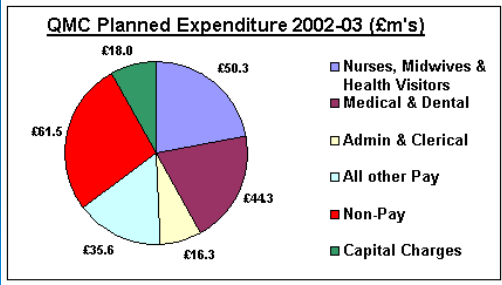
Note: Complete data were unavailable for 1998. These numbers have not been adjusted for inflation.

This slide and the next have been taken from the **Brent Primary Health Care Business Plan** in the UK.



www.brentpct.nhs.uk/_item27292/Close/Minutes200904.doc

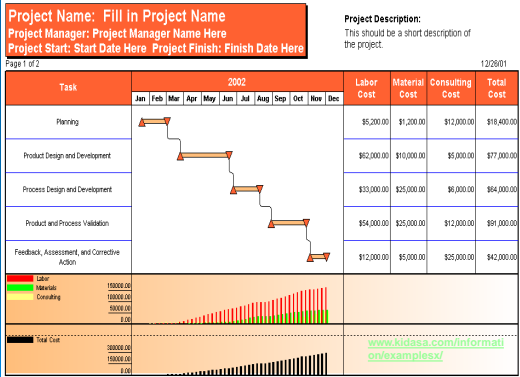
For Discussion Forum points, if you had to cut the budget by 10%, in which sectors would you begin and why? Provide referenced documentation as always.



www.qmc.nhs.uk

Product Development Timeline

Although the next slide is lacking specifics, this would be a useful way of monitoring progress.



Project Time Frame

For Discussion Forum points, develop a project time frame like that in the next slide that relates to you business plan. State your problem/program focus here: _____ . Attach it to your discussion forum **New Thread posting**. Be sure to add references.

This chart is similar to that most organizations would use to summarize costs by sector.

Cost Analysis	Quarters in Year to Jan 2000				Annual Total
	1st	2nd	3rd	4th	
	US\$000	US\$000	US\$000	US\$000	US\$000
Materials/packaging/goods	69.5	77.2	94.4	105.8	347.0
Direct labor	16.7	22.8	33.0	36.6	109.1
Other direct	15.1	19.5	21.4	25.1	81.2
Total Cost of sales	101.4	119.6	148.8	167.6	537.3
Overhead expenses:					
Operational (indirect)	11.8	11.8	11.8	11.8	47.4
Selling & freight	15.1	16.0	17.2	17.7	65.9
Management/admin staff	16.5	16.5	16.5	16.5	66.0
Research & development	10.3	10.3	10.3	10.3	41.0
Administration	5.3	5.3	5.3	5.3	21.0
Occupancy/general	8.6	8.6	8.6	8.6	34.2
Total overhead expenses	67.4	68.4	69.5	70.0	275.4
Total direct costs & expenses	236.3	256.4	287.9	307.6	1,088.2

Proposed Costs by Sector

For Discussion Forum points, begin to lay out a table like that below. State your problem/program focus here: _____ . Attach it to your discussion forum **New Thread posting**.

Begin to fill in the table below. Change the Sector Headings if it helps. It is more important that you begin to fill in the 'Percent' column than the '\$' column. Use budgets from similar programs to come up with these percents.

What is the program or service?

	Sector	Percent	\$
1	Info Systems		
2	Med/Surg Supplies		
3	Real Estate		
4	Furniture/Equipment		
5	Administration		
6	Legal		
7	Insurance		
8	Consulting		
9	Marketing/Promotion		
10	Clinical Services		
11	Management Fees		
12	Miscellaneous		
	Total	100%	

7d. Other Useful Information

The next two slides provide a more comprehensive list of business plan components than we have addressed.

Components of a Business Plan

- ❖ Outline, table of contents
- ❖ Executive summary
- ❖ The management team
- ❖ The product
- ❖ The market for the product
- ❖ The marketing plan
- ❖ The operational plan

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More Components of a Business Plan

- ❖ Financial analysis
- ❖ Objectives & milestones
- ❖ Controls & reporting
- ❖ Ownership & equity
- ❖ Appendixes - Product specifications, market research results, market planning info, detailed financial analysis, job roles

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8. REPORT WRITING

BUSINESS REPORT WRITING

In creating your business report, you could follow these steps :

1. Determine the Scope of the Report
2. Consider Your Audience
3. Gather Your Information
4. Analyze Your Information
5. Determine the Solution
6. Organize Your Report

9. Leviton et al - Evaluability Assessment to Improve Public Health Policies, Programs, and Practices

08/26/13 Introduction

The reason that evaluation is an integral part of a planning course is because:

evaluability assessment can benefit public health in five ways:

1. Serving the core public health functions of planning and assurance,
2. Building evaluation capacity,
3. Navigating federal performance measurement requirements,
4. Translating evidence-based research models into practice, and
5. Translating practice into research by identifying promising practices.

The next slide uses some terms we will employ during the course.

Leviton et al - Evaluability Assessment to Improve Public Health Policies, Programs, and Practices

08/27/12

Introduction

The process involves

- (a) soliciting a topic or theme, such as access to healthy food in poor neighborhoods;
- (b) soliciting a high volume of innovations that address this theme through a broad-based scan;
- (c) using an expert panel of researchers and content experts to screen these nominations for those that are most promising (i.e., plausible to have large effects, to reach large numbers of the target group, to generalize to other populations and settings, to be feasible, acceptable, and sustainable);
- (d) conducting evaluability assessments of those that pass the expert panel screen;
- (e) engaging an expert panel to review the evaluability assessment reports; and
- (f) identifying those innovations that are both promising and ready for evaluation.

Leviton et al - Evaluability Assessment to Improve Public Health Policies, Programs, and Practices



1. The Executive Summary

The **Executive Summary** is a brief overview of your Business Plan.

The next 2 slides are a business plan **Executive Summary** template from Acorn Technologies. Acorn Technologies is a biomedical, bioengineering, and biotechnology start-up business incubator based in Cape Town, South Africa.

As part of the Government's Godisa <http://www.godisa.net/> Program, Acorn provides residential & laboratory facilities, business expertise and a supportive environment for entrepreneurs and their newly formed life science companies.

<http://www.acorn.org.za/index.html>

Executive Summary Template

Abstract

Company

(e.g., quick background, industry, date of incorporation, location, number of employees)

Management

(e.g., brief statement on each person on the senior management team, e.g., name, position, age, prior employers, prior experience in doing similar activities, degrees, schools)

[Link lost.](#)

Executive Summary Template [cont.]

Offering

(e.g., pithy description of product and/or service in layman's terms, key customers, competition)

Value Proposition

(e.g., what is unique about this offering, is it patented/proprietary, why should customers buy)

Financials

(e.g., current revenue, earnings or estimated pro forma profitability)

[Link lost.](#)

[In the case of venture capital requests], the executive summary should begin with a paragraph that summarizes very succinctly:

- the product or technology to be commercialized,
- the value proposition,
- the competitive advantage, and
- the magnitude of the target market.

The body of the executive summary simply elaborates these key issues and includes a description of the

1. stage of development,
2. team,
3. intellectual property, and
4. funding situation.

<http://www.humanities.umd.edu/>





**HIV/AIDS Bureau Budget Forecast
Spreadsheet User Manual**

In order to use the ADAP budgeting tool it is necessary to have at least Windows 98 for the operating system for the computer and Microsoft Excel 95.

When the file is opened, some of the pages are read-only. This is important because information should not be entered on those pages.

When beginning to use this tool, it is best if 18 months of data have been entered. Currently all of fiscal year 2001, and part of fiscal year 2002 should be entered with 15 months of data in total. The program will work with 2001 funding only however, the data will be more complete with 18 months of data.

<http://tinyurl.com/7u23xf>

This slide lays out a process that can be used in developing a marketing plan. Begin to fill in the right hand column below for a possible program/project/product marketing activity

STEP	IDEAS
Gather data	
Set Goals/Objectives	
Formulate Messages	
Select, Format, & Identify Channels	
Pretest Messages	
Communicate Messages	
Evaluate	

Category	FY2011	FY2012	FY2013	FY2014
FY TOTALS				
Market	1.00	1.00	1.00	1.00
Agreement	1.00	1.00	1.00	1.00
Classroom/Welcome	1.00	1.00	1.00	1.00
Teacher	1.00	1.00	1.00	1.00
Resource	1.00	1.00	1.00	1.00
FY2011				
Market	1.00	1.00	1.00	1.00
Agreement	1.00	1.00	1.00	1.00
Classroom/Welcome	1.00	1.00	1.00	1.00
Teacher	1.00	1.00	1.00	1.00
Resource	1.00	1.00	1.00	1.00
FY2012				
Market	1.05	1.10	1.15	1.20
Agreement	1.05	1.10	1.15	1.20
Classroom/Welcome	1.05	1.10	1.15	1.20
Teacher	1.05	1.10	1.15	1.20
Resource	1.05	1.10	1.15	1.20
FY2013				
Market	1.10	1.15	1.20	1.25
Agreement	1.10	1.15	1.20	1.25
Classroom/Welcome	1.10	1.15	1.20	1.25
Teacher	1.10	1.15	1.20	1.25
Resource	1.10	1.15	1.20	1.25
