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 wward@health.usf.edu and I will make every effort to correct this.

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.
Course Schedule

<table>
<thead>
<tr>
<th>Module</th>
<th>WEEK</th>
<th>UNIT</th>
<th>Start Exercise</th>
<th>Complete Exercise</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>A</td>
<td>1</td>
<td>08/25/13</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>A</td>
<td>2</td>
<td>09/01/13</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>A</td>
<td>3</td>
<td>09/08/13</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>B</td>
<td>1</td>
<td>09/15/13</td>
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<tr>
<td>5</td>
<td>C</td>
<td>2</td>
<td>09/22/13</td>
<td></td>
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<tr>
<td>6</td>
<td>C</td>
<td>3</td>
<td>09/29/13</td>
<td></td>
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<tr>
<td>7</td>
<td>C</td>
<td>4</td>
<td>10/06/13</td>
<td></td>
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<tr>
<td>8</td>
<td>C</td>
<td>5</td>
<td>10/20/13</td>
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<tr>
<td>9</td>
<td>D</td>
<td>1</td>
<td>10/13/13</td>
<td></td>
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<td>10</td>
<td>D</td>
<td>2</td>
<td>10/13/13</td>
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<td>11</td>
<td>E</td>
<td>1</td>
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<td>E</td>
<td>2</td>
<td>10/27/13</td>
<td></td>
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<tr>
<td>13</td>
<td>E</td>
<td>3</td>
<td>10/27/13</td>
<td></td>
</tr>
</tbody>
</table>

A few guidelines:

- send all course correspondence to the Canvas course site
- send all private correspondence to phc6146@gmail.com *
- send a copy to wward@health.usf.edu [these are filed as a group to be saved in case of a system failure].
- be sure to read all articles as we go along.
- if there is a crisis, call 813-205-6269
- send faxes to 813-254-0173 after letting instructor know

* The emails come only to the instructor.

COURSE FOCUS

This course focuses on the world as a whole although many of the examples used are from developing countries.

Course participants spend the semester in developing a business plan for a real or potential future [harder to do] organization in a specific setting.

This session briefly introduces topics [view the Session Outline in the next slide] that will be dealt with in detail over the course.
SESSION OUTLINE

COURSE LEARNING OBJECTIVES

1. THE COURSE PLANNING & EVALUATION MODEL
2. STRATEGIC PLANNING AND BUSINESS PLANNING
3. EVALUATION PARADIGMS
4. RESULTS BASED MANAGEMENT
5. STRATEGIC PLANNING
6. DEVELOPING A BUSINESS PLAN
   a. Description of the Business
   b. The Marketing Plan
   c. The Financial Plan
   d. Other Useful Information
7. REPORT WRITING
8. Leviton et al - Evaluability Assessment to Improve Public Health Policies, Programs, and Practices

INTRO

8/26 Introduction

Each of the pages in this section is introduced by the name of the PowerPoint Session you can download from Canvas.

Readings (downloadable from Canvas)
Brethen - The Business Plan versus the Strategic Plan - Part I
http://www.bizquest.com/resource/the_business_plan_versus_the_strategic_plan_part_1.doc
Leviton et al - Evaluability Assessment to Improve Public Health Policies, Programs, and Practices
Lessons Learned from Implementing Results-Based Management (RBM) in CIDA Results-Based Management Division, Performance Review Branch, June 1998
http://www.acdi-cida.gc.ca/CDAWEB/acdicida.nsf/En/REN-218132659
Case Study #2: Yunnan Mother and Child Health Project China Country Program, Asia Branch
http://www.acdi-cida.gc.ca/CDAWEB/acdicida.nsf/En/EMA-218131833
Chang et al - Morbidity Trajectories as Predictors of Utilization - Multi-year Disease Patterns in Taiwan's National Health Insurance Program.pdf

Begin Exercise I [the Exercise template can be downloaded from Canvas. Your job is to select an organization and fill in the template]. Begin working on the Exercise even if you are not sure of your topic.
CONCLUSIONS

A simple morbidity trajectory classification based on simple risk stratification across 3 years is as predictive a tool in explaining future medical utilization as more complex standard risk adjusters using diagnostic information from the baseline year preceding the evaluation year. Adding morbidity trajectories to a comprehensive risk-adjustment model from the baseline year does not seem to increase this model's explanatory ability. Thus, for healthcare systems without the stability of continuous enrollment, it may not be necessary to construct longitudinal morbidity trajectories. However, given that research involving morbidity trajectories are still rare, there is much room left to further investigate the potential applications and implications of morbidity trajectory groups, especially for a healthcare system with readily available longitudinal claims data, such as Taiwan.
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 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.

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 diagram shows how the Strategic Plan and Business Plan are linked to one another.

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.
This diagram visually indicates the need for Strategic Planning.

In the lower right-hand corner, the foundation for operational planning leads into the business plan.

Strategic Planning and Business Planning must be seen as parts of a continuum. Here Step 6 is the Business Plan with Step 7 being the Evaluation Component. When the key performance indicators and metrics are bad, it is time to update the STRATEGIC Plan to make sure that there is a need and that the business is addressing that need.

The following slide is a depiction of the Business Plan of a Health-related Corporation.
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.
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]

http://www.mande.co.uk/docs/Rosettastone.doc

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

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.
This table helps you measure your business against competitors.

<table>
<thead>
<tr>
<th>Strategic Focus</th>
<th>Uncompetitive</th>
<th>Competitive</th>
<th>Distinctive</th>
<th>Breakthrough</th>
</tr>
</thead>
<tbody>
<tr>
<td>Product Leader</td>
<td>3.0, 4.0, 5.0</td>
<td>5.0-6.0</td>
<td>6.0-7.0</td>
<td>7.0-8.0</td>
</tr>
<tr>
<td>Cost Leader</td>
<td>1.0-2.0</td>
<td>3.0-4.0</td>
<td>4.0-5.0</td>
<td>5.0-6.0</td>
</tr>
<tr>
<td>Convenience Leader</td>
<td>6.0-7.0</td>
<td>7.0-8.0</td>
<td>8.0-9.0</td>
<td>9.0-10.0</td>
</tr>
<tr>
<td>Service Leader</td>
<td>3.0-4.0</td>
<td>4.0-5.0</td>
<td>5.0-6.0</td>
<td>6.0-7.0</td>
</tr>
<tr>
<td>Solutions Leader</td>
<td>5.0-6.0</td>
<td>6.0-7.0</td>
<td>7.0-8.0</td>
<td>8.0-9.0</td>
</tr>
</tbody>
</table>

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.
Here is a framework you can use to begin thinking about developing a business plan. Why don’t you complete this for this week’s discussion forum?

**USAID Log Frame**

The log frame diagram on the right suggests that the purpose of the project is linked to the program goals.

The outputs (increased immunizations) are caused by additional activities (worker training, new vehicles, vaccine supplies, etc.). Assumptions are that there will be peace & reasonable weather plus community support [for example]
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.

### 6. STRATEGIC PLANNING

<table>
<thead>
<tr>
<th>Project Structure</th>
<th>Objectively Verifiable Indicators</th>
<th>Means of Verification</th>
<th>Important Assumptions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Goal</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Purpose</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Outputs</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Activities</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
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.

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.
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 an 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.
Selling cars is just to get their foot in the door.

The value chain is a systematic approach to examining the development of competitive advantage. It was created by M. E. Porter in his book “Competitive Advantage” (1985). The chain consists of a series of activities that create and build value. They culminate in the total value delivered by an organization. The ‘margin’ depicted in the diagram is the same as added value. The organization is split into ‘primary activities’ and ‘support activities.’
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.

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.

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.
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.

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.
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.

<table>
<thead>
<tr>
<th>Positive</th>
<th>Negative</th>
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</thead>
<tbody>
<tr>
<td>Strengths</td>
<td>Weaknesses</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Strengths</th>
<th>Weaknesses</th>
</tr>
</thead>
<tbody>
<tr>
<td>Technical skills</td>
<td>Absence of important skills</td>
</tr>
<tr>
<td>Leading brands</td>
<td>Weak brands</td>
</tr>
<tr>
<td>Distribution channels</td>
<td>Poor access to distribution</td>
</tr>
<tr>
<td>Customer loyalty / relationship</td>
<td>Low customer retention</td>
</tr>
<tr>
<td>Production quality</td>
<td>Unreliable product / service</td>
</tr>
<tr>
<td>Price</td>
<td>High cost</td>
</tr>
<tr>
<td>Management</td>
<td>Management</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Opportunities</th>
<th>Threats</th>
</tr>
</thead>
<tbody>
<tr>
<td>Changing customer tastes</td>
<td>Changing customer tastes</td>
</tr>
<tr>
<td>Globalization of geographic markets</td>
<td>Globalization of geographic markets</td>
</tr>
<tr>
<td>Technological advances</td>
<td>Technological advances</td>
</tr>
<tr>
<td>Changes in government policies</td>
<td>Changes in government policies</td>
</tr>
<tr>
<td>Lower prices</td>
<td>Tax increases</td>
</tr>
<tr>
<td>Change in population age structure</td>
<td>Change in population age structure</td>
</tr>
<tr>
<td>New distribution channels</td>
<td>New distribution channels</td>
</tr>
</tbody>
</table>

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.
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.

"I'll have to call you back - major international crisis - all the little flags have fallen off our map."

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.

http://www.ecommons.net/sustain/images/graph.gif

* [Health educators tend to reverse the outcomes and impact terms – impact meaning behaviour change]

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

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.
7a. Description of the Business

As mentioned, the description of the business is one of the first steps in building a business plan.

The next slide shows the vertical structure of the Malaysian government. The slide following is more generic in nature.

If we consider the government to be a business, the Parliament would be where different stakeholders meet, lobby, and attempt to influence the future direction of the business.

In our case, we are interested in those parliament members who have the most influence over health-related issues.
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.

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 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.

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.
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-vis its **Internal** and **External Environments**, **Skills**, and **Resources**.

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**.
The Mission is a result of Values and Environmental Monitoring.

The Mission aims to select what is doable from a much broader Vision Statement.

The next slide shows how goals are linked to the Strategic Plan.
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).

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.
The 2 following slides are from the Michigan Education Plan.

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 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?).

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.
7b. The Marketing Plan

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

- Product
- Placement
- Promotion
- Price

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.
The Fire Communicator’s Guide

The Pennsylvania Breast Cancer and Environmental Risk Factor (PA-BCERF) Fund

Link has been lost. See next slide.

Changing Behaviors

The 4 components to the left are often included in behavior change models with the idea that you first change knowledge. This leads to a change in attitudes which leads to behavior change.

In the last few years, researchers have determined that it is best to create opportunities for behaviors to occur.

As a result of this, people develop attitudes about the behavior from practicing it.

They then tend to seek more information which leads to knowledge change which develops intentions to repeat the behavior.

The best approach is to develop materials and test them constantly with and without opportunities to practice new behaviors until behavior change is maximized.

Thus, BAKI is more likely than KABI.
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.
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.
Fritz Heider came up with the model on the right that examines the interaction among the audience [consumer], the message [about the product], and 

The source of the message - whether relations are positive or negative among the elements is critical and a negative attitude by the audience toward the source will lead to a negative attitude toward the message.

http://www.gerardkeegan.co.uk/glossary/gloss_b.htm

For those who are very interested in building persuasive communications, get out your microscope. This matrix was taken from a classic article by William Maguire [1979].

<table>
<thead>
<tr>
<th>Source</th>
<th>Message</th>
<th>Audience</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Expert</td>
<td>Affective</td>
<td>Trustworthiness</td>
</tr>
<tr>
<td>2. Authoritative</td>
<td></td>
<td>Perceived</td>
</tr>
<tr>
<td>3. Likeable</td>
<td></td>
<td>Credibility</td>
</tr>
<tr>
<td>4. Competence</td>
<td></td>
<td>Recency</td>
</tr>
<tr>
<td>5. Expertise</td>
<td></td>
<td>Authority</td>
</tr>
<tr>
<td>6. Agreement</td>
<td></td>
<td>Legitimacy</td>
</tr>
<tr>
<td>7. Credibility</td>
<td></td>
<td>Authority</td>
</tr>
<tr>
<td>8. Likeability</td>
<td></td>
<td>Credibility</td>
</tr>
<tr>
<td>9. Trustworthiness</td>
<td></td>
<td>Legitimacy</td>
</tr>
<tr>
<td>10. Credibility</td>
<td></td>
<td>Sensitivity</td>
</tr>
<tr>
<td>11. Authority</td>
<td></td>
<td>Persuasiveness</td>
</tr>
<tr>
<td>12. Sensitivity</td>
<td></td>
<td>Trustworthiness</td>
</tr>
<tr>
<td>13. Legitimacy</td>
<td></td>
<td>Likeability</td>
</tr>
<tr>
<td>14. Persuasiveness</td>
<td></td>
<td>Likeability</td>
</tr>
<tr>
<td>15. Trustworthiness</td>
<td></td>
<td>Sensitivity</td>
</tr>
</tbody>
</table>

The column headings are the categories and subcategories of impact that are independent variables of the model or communication factors. The row headings are the independent variables of the matrix that represent the communication characteristics of each element, and the values represent the interaction among the elements.

There are a lot of resources available for the person who is not well versed in marketing.

www.hubspot.com/marketing-resources

Marketing Resources for Small Businesses: strategic Internet marketing tips, Internet marketing whitepapers, Internet marketing webinars, and links to more ...

Internet Marketing - Marketing Tools - Marketing Kits - Marketing Webinars

www.marketingpro.com/Cached - Similar

You +1'd this publicly. Undo

5 hours ago – One source for online marketing resources, marketing articles, online seminars, case studies, conferences and events for Marketing ...

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www.resources-results.com/Cached - Similar

You +1'd this publicly. Undo

Get the sales results you want with our marketing help. Trust the marketing experts that deliver the sales tools you need. Find out more here.
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?

http://www.mhlw.go.jp/english/
Japan, Ministry of Health, Labour, and Welfare
Annual Reports on Health and Welfare
1998-1999 Social Security and National Life

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.
If you are monitoring sector spending, graphs like these over several years can give you an idea of where expenses are getting out of hand.
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?


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

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

QMC Planned Expenditure 2002-03 (£m's)

- £96.3
- £95.5
- £14.3
- £16.3

www.qmc.nhs.uk

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

Product Development Timeline

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

Project Name: Fill in Project Name
Project Manager: Project Manager Name Here
Project Start: Start Date Here
Project Finish: Finish Date Here
Project Budget: £120,000

- Project Description:
  This should be a short description of the project.
## Project Time Frame

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

<table>
<thead>
<tr>
<th>Week 1</th>
<th>Week 2</th>
<th>Week 3</th>
<th>Week 4</th>
<th>Week 5</th>
</tr>
</thead>
<tbody>
<tr>
<td>Task A</td>
<td>Task B</td>
<td>Task C</td>
<td>Task D</td>
<td>Task E</td>
</tr>
</tbody>
</table>

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

### 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.

<table>
<thead>
<tr>
<th>Cost Category</th>
<th>1st Quarter</th>
<th>2nd Quarter</th>
<th>3rd Quarter</th>
<th>4th Quarter</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Direct Materials</td>
<td>$500</td>
<td>$600</td>
<td>$700</td>
<td>$800</td>
<td>$2600</td>
</tr>
<tr>
<td>Direct Labor</td>
<td>$100</td>
<td>$120</td>
<td>$140</td>
<td>$160</td>
<td>$520</td>
</tr>
<tr>
<td>Indirect Costs</td>
<td>$150</td>
<td>$180</td>
<td>$210</td>
<td>$240</td>
<td>$800</td>
</tr>
<tr>
<td>Total</td>
<td>$850</td>
<td>$900</td>
<td>$950</td>
<td>$1040</td>
<td>$3,740</td>
</tr>
</tbody>
</table>

**Notes:**
- Direct Materials: Includes raw materials, packaging, and other direct costs.
- Direct Labor: Salaries and wages of employees directly involved in the project.
- Indirect Costs: Includes overhead, equipment, and other indirect expenses.
- Total: The sum of all direct and indirect costs.

**References:**
- www.planware.org/gmanagement.htm

---

8/22/2014
Any organization with which you are/become involved should have a profit and loss statement something like this:

![Profit and Loss Statement](http://www.mdiachieve.com/)

For an email point, begin to lay out the above table. State your problem/program focus here:

_________________________

Attach it to your discussion forum New Thread posting.

Cost wheels such as this provide a visual way of monitoring costs:

![Operating Expenses](http://www.cvdinfobase.ca/cvdbook/en/chapt3main.htm)
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.

<table>
<thead>
<tr>
<th>Sector</th>
<th>Percent</th>
<th>$</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Info Systems</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2. Med/Surg Supplies</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3. Real Estate</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4. Furniture/Equipment</td>
<td></td>
<td></td>
</tr>
<tr>
<td>5. Administration</td>
<td></td>
<td></td>
</tr>
<tr>
<td>6. Legal</td>
<td></td>
<td></td>
</tr>
<tr>
<td>7. Insurance</td>
<td></td>
<td></td>
</tr>
<tr>
<td>8. Consulting</td>
<td></td>
<td></td>
</tr>
<tr>
<td>9. Marketing/Promotion</td>
<td></td>
<td></td>
</tr>
<tr>
<td>10. Clinical Services</td>
<td></td>
<td></td>
</tr>
<tr>
<td>11. Management Fees</td>
<td></td>
<td></td>
</tr>
<tr>
<td>12. Miscellaneous</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td>100%</td>
<td></td>
</tr>
</tbody>
</table>

What is the program or service?

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

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

8. 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


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.
Logic model:

- A graphic depiction of the rationale and expectations of the program.

Theory of change:

- Describes the mechanisms through which the initiative's inputs and activities are thought to lead to the desired outcomes.

Stakeholders:

- Those with a stake or interest in the program or in its evaluation.

Outcomes:

- Achievement of short, intermediate, and long-term objectives of a program.

Development of the evaluation design needs to be done at the beginning of the program so that stakeholders can agree on what they want to have evaluated. The next slide shows a framework for evaluation.
The CDC Evaluation Framework is composed of six steps:

1. Engage stakeholders.
2. Describe the program and agree on program goals and expected effects, activities or strategies engaged, resources for implementation, capacity to effect change, stage of development, and contextual information.
3. Focus the evaluation, including the high-priority evaluation questions and designs that maximize confidence in those answers.
4. Gather credible evidence including the data needed to answer evaluation questions, the sources from which those data can be obtained, and the credibility of the data and data sources to the stakeholders.
5. Justify conclusions using standards, analytic procedures, interpretation, and judgment to determine the extent to which evaluation conclusions are justified.
6. Ensure use and share lessons learned.

A new development for evaluability assessment is to translate practice into research (8) [and research into practice] by identifying promising practices that are ready for evaluation.

The process, which we [Leviton et al] have termed the systematic screening and assessment (SSA) method, aims to cast a wide net for promising innovations, then screen these innovations systematically to assure that those remaining at each step have a high likelihood of being effective and ready for evaluation.
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.

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.


10. The Executive Summary

- Introduction
- The Executive Summary
- 08/27/12
- 10. The Executive Summary
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)

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)

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.
Appendices

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/7qj3xkf
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.

<table>
<thead>
<tr>
<th>STEP</th>
<th>IDEAS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gather data</td>
<td></td>
</tr>
<tr>
<td>Set Goals/Objectives</td>
<td></td>
</tr>
<tr>
<td>Formulate Messages</td>
<td></td>
</tr>
<tr>
<td>Select, format, &amp; Identify Channels</td>
<td></td>
</tr>
<tr>
<td>Pretest Messages</td>
<td></td>
</tr>
<tr>
<td>Communicate Messages</td>
<td></td>
</tr>
<tr>
<td>Evaluate</td>
<td></td>
</tr>
</tbody>
</table>

[http://tinyurl.com/7qj3xkf](http://tinyurl.com/7qj3xkf)