BUSINESS FOR HEALTH

BUSINESS SKILLS FOR PRIVATE MEDICAL PRACTICES

FACILITATOR GUIDE

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FACILITATOR GUIDE

TABLE OF CONTENTS

ACKNOWLEDGEMENTS

The Strengthening Health Outcomes through the Private Sector (SHOPS) project developed the Business for Health training program for the United States Agency for International Development (USAID). This training was field tested with a group of private health facilities in December 2013 in Kenya and finalized in July 2014. The author would like to thank the pilot program participants for their engagement in the course and their thoughtful comments, which have been incorporated in the final materials.

ABOUT SHOPS

SHOPS is a five-year, USAID-funded global project that focuses on increasing availability, improving quality and expanding coverage of essential health products and services in family planning (FP) and reproductive health (RH), maternal and child health, HIV and AIDS, and other health areas through the private sector. Among its core objectives, SHOPS improves the viability of private-health-sector businesses and increases their access to financing, thereby improving their capacity to respond to the health needs of the population.

INTRODUCTION

BACKGROUND

The Business for Health training program was developed based on years of USAID's experience in improving the business skills of small-scale private health providers. Poor business and financial management capacity is a major constraint to the development of the private health sector and its ability to offer family planning, reproductive health, HIV and AIDS, maternal and child health and other essential health services. In many developing countries, private health care businesses are often owned and operated by clinicians who do not have training in business and financial management. Poor business and financial management can impact a provider's ability to offer quality health services, add or expand services, and operate viably.

USING THIS GUIDE

This guide provides an overview of the training, including learning goals, target audience, course content and structure, and delivery options. It offers general guidance to facilitators on topics such as structuring the training programs, timing, and sequencing of modules. In addition, the guide provides guidance on organizing materials and preparing for training events, training methodology, learning activities, managing classroom interactions, responding to participant questions, and setting up the classroom layout for effective learning. Short descriptions of the modules are included in Annex A. These descriptions briefly summarize each module and can be used as leaflets to market the program.

The program consists of 22 modules that are organized into five areas of business management for a health practice: general management issues, operations management, quality management, financial management, and marketing. These modules can be delivered together or separately. Delivery options are discussed in Section 1.6. Each module contains a complete set of training materials for facilitators to conduct training sessions. These materials include lesson plans containing learning goals and objectives, pre-session preparation tips, and notes for facilitating the module, as well as participant materials and power point slides.

I. OVERVIEW OF TRAINING

1.1 TARGET AUDIENCE

The target audience for this training includes owners, partners and general managers of small private health care practices. The more general modules may also be applicable to owners of small pharmacies, but they are not the primary target audience for this training.

1.2 LEARNING GOALS

Owners of small-scale private medical practices will learn what it means to be a business owner, and will develop their knowledge and skills in operations management, quality assurance and improvement, financial management, and marketing. In doing so, they will be able to manage their practices more efficiently and effectively, safely serve their patients, and keep their practices financially stable and profitable.

Each module in the series has specific learning objectives. Please refer to each module lesson plan for a detailed list of learning goals.

1.3 COURSE CONTENT AND STRUCTURE

There are a total of 22 full-day training modules, organized into five sections or topic areas:

I. Health Practice as a Business

Module 1: Health Practice as a Business
Module 2: What it Means to be a Business Owner
Module 3: The Impact of Personality
Module 4: Defining Your Health Practice Business
Module 5: Manage the Growth of Your Health Practice

II. Operations Management of Your Practice

Module 6: Manage Human Resources
Module 7: Manage Medications and Medical Supplies
Module 8: Manage Medical Records
Module 9: Manage Your Facility
Module 10: Manage Risk in Your Health Practice

III. Quality Assurance and Improvement in Your Practice

Module 11: Understand Quality in Your Health Practice
Module 12: Establish a Patient-Safety Culture
Module 13: Ensure Quality at Every Stage of a Patient's Experience

IV. Financial Management for Your Practice

Module 14: Understand the Importance of Financial Information
Module 15: Understand Your Costs and Profitability
Module 16: Manage Payments and Collections
Module 17: Manage Your Cash Flow
Module 18: Develop an Operational Budget
Module 19: Fund Your Practice

V. Marketing Your Health Practice

Module 20: Understand the Market
Module 21: Price Your Products and Services
Module 22: Market Your Health Practice

1.4 COMPETENCY-BASED TRAINING

This program is a competency-based training program[1]. Competency-based performance is a current trend used in both business and government. One comprehensive definition of "competency" is:

"A cluster of related knowledge, skills, and attitudes that affects a major part of one's job (a role or responsibility), that correlates with performance on the job, that can be measured against well-accepted standards, and that can be improved via training and development" (Training Magazine, July 1996).

Competency-based training and completion is an approach to vocational education and training that places emphasis on what a person can do in the workplace as a result of completing a program of training. Competency-based training is focused on outcomes. Curricula are developed to help learners achieve and demonstrate their ability to perform defined competencies.

Progression through a competency-based training program is determined by the student demonstrating that they have met the competency standards through the training program and related work, not by time spent in training.

[1] The evidence in support of competency- based approaches to development is considerable. In the *Harvard Business Review*, Burnham and McClelland have demonstrated that seminars designed to facilitate competency-based feedback and greater self-awareness for managers increased their management performance.

Defining management competencies is a starting point. The identification of management competencies helps individuals to refer to common definitions (i.e. lists of behaviors) of the skills and attributes essential for competent performance in their role.

1.5 TRAINING PHILOSOPHY

The learning activities have been structured to treat the participants with respect, to set them up for successful learning, and to use the training time as effectively and efficiently as possible. To this end, care is taken not to waste time by teaching them what they already know.

In order to increase the probability that the participants will be motivated to learn, new information is given in small doses and buy-in is accomplished by building upon what participants already know from their personal experiences.

The exercises have been structured to be interactive and enjoyable, and to appeal to all learning styles. The participants will work in groups on these activities, and the size and composition of those groups will change for various exercises. The different types of small group activities are intended to ensure high-energy participation that will need to be managed by the facilitator.

Since there is a good possibility that the participants already have some of the information, the focus of the learning activities is to draw the information from them, with additional enhancements made by the facilitator on an as needed basis. Doing so may include prompting them with questions that will help them discover the correct or complete answer. Or it may involve having them review reference pages to try to discover the answers themselves.

Small group discussion, augmented by facilitator lecture, is used where it is likely that some, but not all, of the participants may know some of the answers– but may also need clarification and/or validation by the facilitator. Lecture should only be used when it is likely that none of the participants will know the answers.

1.6 DELIVERY OPTIONS

This program has been designed for delivery in a classroom setting. With appropriate modifications, it could also be delivered through different channels, as outlined below.

Options

<u>Classroom</u>:

1. As a complete program including all modules [with homework assignments between modules] for educational credit

2. As a certificate program including all modules [without homework assignments]

3. By section (topic area)

4. By pairing modules (in different combinations) to create two-day programs. For example:

1 & 2	3 & 4	4 & 5	6 & 3	7 & 8
9 & 10	10 & 11	12 & 13	14 & 15	16 & 17
18 & 19	20 & 21	21 & 22		

5. By individual module (7 hours)

<u>Distance Learning (requires adaptation and development of additional materials):</u>

1. Self-study, with written and online video resources

2. Self-study, with written resources and webinars

3. Self-study, with an e-learning format

4. Certificate Program: This curriculum could be taught as a year-long program, meeting every other week. In addition to attendance at each of the 22 modules, the participants could be responsible for:

    a. Completing the homework assignments for each module.

    b. Submitting a 2-page written report about the results of their assignment using a template: what they did, why, what happened, what they learned from it, and what they will do (the same or differently) in the future.

    c. Selecting between three identified options: a book, an article or an on-line video (a TED presentation, possibly) on each module topic.

    d. Submitting a 1-2 page "book report" on their additional learning, following a template they are given.

    They could be given a deadline by which the two reports have to be submitted to an email address or a place on a website. The successful completion of the module could be predicated on the timely submission of acceptable reports.

    Alternatively, steps 1 and 2 could be mandatory to complete the module and steps 3 and 4 an option for extra credit (to raise a grade, perhaps).

Sequence

Section 1: Health Practice as a Business should be taught first to build a business management mindset in the participants.

It is recommended that Section 2: Operations Management of Your Practice, be taught with Section 3: Quality Assurance and Improvement in Your Practice. The first four modules in Section 2 lay the basis for the discussion of risk management in the last module of Section 2. This risk management module leads into the discussion of quality assurance and improvement in Section 3, which encompasses the activities described throughout Section 2.

There is no recommended sequence for Section 4: Financial Management for Your Practice and Section 5: Marketing Your Health Practice. Each could be taught separately.

Timing

Ideally, there should be a week or two between modules to give the participants sufficient time to implement the homework assignment, or at least to give them enough time to start implementation.

If a section is taught on consecutive days, the homework assignments could be referenced but not required.

First Half Hour

In anticipation of the possibility that each module would be taught separately to different participant groups, the first half hour includes participant introductions.

If the participants remain the same, that half hour can be used for:

a. Participant reports on their homework assignments.
b. A guest speaker whose experience validates content in a module.
c. Reviewing complex topics when evaluations indicate a need.

Scheduling Options

1. All modules could be taught over an extended period of time, for example five or six week period, if taught over weekends.

2. The first two modules could be taught over a weekend and then one module per week

3. One section of the course could be taught over several days depending on the number of modules in the section, with a space of one or two weeks, or of one month between the next scheduled pair of modules.

4. Each module could be taught separately, possibly a week apart.

1.7 TRAINER QUALIFICATIONS

The ideal trainer for this program will have:

- Experience and comfort with facilitating participatory learning
- Knowledge of adult learning theory and practices
- Good presentation skills
- Knowledge of and/or experience in the content areas, including: business, budget, financial, human resource, facility and records, marketing and stakeholder, and academic quality management
- Knowledge of and/or experience in the private health sector
- A willingness and ability to adapt to the needs of the target audience, while still fulfilling the objectives of the training session
- Proven group facilitation skills
- Respect for the participants' knowledge and experience
- A clear understanding that training is about the learner, not the trainer
- The ability to explain complex content in clear and accessible language
- A commitment to the successful learning of the participant
- The ability to manage enthusiastic, disruptive, and/or disengaged learners in an effective and constructive manner
- The ability to maintain a positive, safe and motivational learning environment
- Excellent communication skills
- Good organizational skills
- Good time management skills
- A willingness to receive and incorporate constructive feedback
- An ability to engage all learning styles
- The ability to acknowledge and learn from mistakes

2. FACILITATOR GUIDELINES

2.1 KEY POINTS

The following are key points that are worth repeating to participants:

1. Their health practices are small businesses.

2. The participants need to think of themselves as small business owners.

3. The participants need to think like business managers.

2.2 TIMING

1. Each module is seven hours, including an hour for lunch. A typical training day could be structured from 9:00 a.m. to 4:00 p.m., with an hour lunch break from 12:00 p.m. to 1:00 p.m.

2. Timing throughout the day is very critical. Keep a clock on the facilitator table, so that you can keep track of your time, and wear a watch.

3. Each section of the training has a specific duration, so it will be very important to open and close each activity in accordance with the established timetable.

4. When assigning a learning activity, be clear about the length of time that the participants have to complete it. You may want to download a free PowerPoint countdown timer from the internet so that the participants can track how much time they have.

5. Always give the participants a five-minute and one-minute warning so they know they will need to wrap up the activity.

6. Ten- or fifteen-minute breaks are also given every hour, in order to keep the participants awake and energized. The training atmosphere should be comfortable and informal. Physical activities, such as throwing a ball or beanbag, are encouraged.

7. Make sure to tell the participants exactly when to return from their breaks.

8. The best way to ensure that they return on time is to get a volunteer participant to make sure they all are back in their seats at the end of the break.

2.3 ORGANIZING YOUR MATERIALS

- Make sure to insert pages from this Facilitator Guide where appropriate in your binder.
- One helpful hint is to write down the facilitator notes and time frames on the pages of the actual participant manual - since it is very difficult to refer back and forth from the participant packet to the Facilitator Guide pages.

2.4 CREATING A SENSE OF COMMUNITY

- It really helps to be there early to meet as many people as possible. Doing so tends to lessen anxiety on all sides and creates a nice rapport between the facilitator and the participants. Besides introducing yourself and asking the person's name, also ask what they do and why they have come to the training. You will then have some familiar faces in the audience and may be able to refer to individuals by name.
- It is always a good device to ask common ground questions, such as "How many of you…?" in order to help people feel they have something in common. Make sure that you keep asking topic-relevant questions until everyone has been able to raise their hands.
- Avoid making assumptions and expressing them, such as "We all know x." If we all don't know x, these questions will make us feel excluded from the group. Instead, ask, "How many of you are familiar with x?" This format gives you the option to have someone from the group explain x, so that everyone now knows what it means. If everyone raises their hands, then you can proceed more comfortably with the belief that everyone already does know x!
- Ask people at the breaks how the workshop is going. Our experience shows us that this contact encourages individuals who were silent prior to this time to have the confidence to participate openly in class discussions. Perhaps it is the one-on-one contact that gives the individuals the sense that you really care about their satisfaction and success in the program.

2.5 MAINTAINING A SMOOTH FLOW

- Keep in mind that all of the information pertains to what the participants need to know and do. Reinforce the relevance of the information whenever possible.
- Use transitional statements that move the group from the previous content to the content now under discussion.

- Refer back to earlier statements made by the participants or other facilitators, to build on their comments and tie their information to the current content.

2.6 ASSIGNING AN ACTIVITY

- When assigning either an individual or a group activity, indicate how long they have to complete the assignment.

2.7 MODELING THE ASSIGNMENT

- The participants should not be asked to do something before they have been given an example or a model of the activity or the process they should follow. They can then refer to this example as they do their own small group work.
- For example, if the small groups will be brainstorming, the facilitator should start off the exercise by asking the entire group for one or two examples and writing what they say on the flipchart. Or, if the groups will be working with different case studies, the facilitator should walk the group through the analytical process they should use with a brief model case study.

2.8 CHECKING FOR COMPREHENSION

- Check for comprehension of the content. You can do this by asking questions or encouraging participants to provide some examples.
- After giving an assignment, walk around the room to be sure participants understand and are working on the correct assignment.
- Check with the participants occasionally—either in the large group, by talking with individuals during the break, or walking around listening to the small groups as they work on the activity—to be sure that the pace is comfortable and everyone is on the same page with you.

2.9 DEBRIEFING ACTIVITIES

- It is important to have the individual or group representatives report out after they have completed an activity. Otherwise, they will not have any sense of closure.

- Draw out the correct or more complete answers from the group, so that when you tell them the correct answer, it will simply validate what they have identified. Remember that we want to build their confidence in their own competence!

- Here are a few report out methods that you can use to ensure variety:

    a. Thumbs up if you agree, thumbs down if you don't.

    b. Can someone tell us the answer to question x? [Call for a volunteer.] Then ask the participants to raise their hands if they agree or if they disagree. Call on one of the dissenters for his or her response. Ask the group to identify the correct response, or tell them yourself.

    c. Have one group report their answer. Ask if any other groups have something different or something to add.

    d. If more than one table group worked on the same case study, alternate between them in answering the different questions relating to the case study.

    e. Move from one table group to another to answer different questions.

2.10 RESPONDING TO PARTICIPANT QUESTIONS

Given the choice between participants who never ask any questions and participants who ask a lot of questions, the latter is better. The fact that they have questions indicates that they are highly interested in the topic, and that's a good thing!

1. Make sure everyone has heard the question before you answer it. Either repeat the question yourself if other participants may not have heard it, or request that the individuals project more, so that others can hear what they are saying.

2. To reinforce the questioner's need to project, walk to the opposite side of the room from the participant who is speaking. Although doing so may seem counterintuitive (typically, we move closer to people we can't hear, rather than farther away from them), the person will always direct his or her comments toward the facilitator.

3. When participants ask a question, defer it to the rest of the group. If someone in the group can answer the question, it provides validation for that person. If no one has an answer, you still gain some time to think about the question so that you can give your best answer.

4. Remember to summarize and/or validate the correct answer after receiving the answer from another participant. If you don't provide a summary or validation, it may give the appearance that you are deferring the question because you don't know the answer, rather than because it is an excellent training technique.

5. There may be times when you have a sense that the questioner already has an answer for his or her own question. In that case, ask what the questioner thinks. The ability to answer the question can provide good validation for the participant.

6. Do not feel that you must answer a question to the complete satisfaction of the questioner. Some questioners may never be satisfied– in fact, they may intend to distract or argue with you, which can unnecessarily tie up a lot of precious class time.

7. Rather than asking, "Have I answered your question?" or "Has your question been answered to your satisfaction?" say instead: "Was that responsive?" This tactic is particularly important if you have a rather difficult participant who is trying to bait you or monopolize the session. However, regardless of the nature of the question or the questioner, you can ask, “Was that responsive?” as a courtesy to provide some closure to the dialogue.

8. Some questions may be of interest only to the questioner. In this case, they need to be deferred to another time (a break, lunch, after the workshop). It is perfectly fine to tell a participant that the question is a good one but may not be relevant to the other participants, so it would be best answered “off-line.” Just make sure to follow up and have the conversation when you say you will.

9. Some questions may anticipate content that will be covered later in the session. You may not want to confuse the larger group by answering the question at that moment. Simply congratulate the questioner for his or her advanced awareness and ask them to wait until the topic and answer come up in the curriculum.

10. Often, participants are anxious to ask their questions immediately because they are afraid they will forget them. One way to minimize participant impatience is to provide post it notes so they can jot down their questions as they arise. You may also want to have a “Parking Lot” flip chart where they can place their post it notes. Just make sure to check the “Parking Lot” at breaks so that you can plan when to answer the questions.

11. If, despite all of these deferring techniques, a participant keeps asking the same question, it is best to provide a brief answer and move on. Some participants may really need to have the answer so that they can focus on the content at hand.

12. Some questions may have more than one appropriate answer, depending on the situation. If the situation appears relevant, and the questioner can explain it in a concise fashion, feel free to answer it. However, often you need more time to delve into the situation before

you can give a useful response. In that case, simply explain that to the questioner and plan a time to discuss it “off-line.”

13. It is also perfectly acceptable to tell participants if you do not know the answer. Just make sure to note the question down and promise to provide an answer once you have had an opportunity to research the issue.

2.11 HANDLING PARTICIPANT RESPONSES

It’s one thing to recognize the importance of engaging learners by drawing information from them rather than telling them. However, how long do you wait for them to answer? The silence can be deafening to a facilitator on a tight time schedule. And what do you do if the learner’s answer is incorrect? How do you make sure the group gets the correct answer without embarrassing the participant who got the answer wrong?

Waiting for Responses

- If you ask, "Are there any questions?" make sure that you look around to see if there <u>are</u> any questions.
- If you ask a specific question, make sure that you give the participants sufficient time to respond. You may need to count to 10 slowly in your head.
- If a participant is only giving you a partial response, coach that person by asking questions that, through the examples, help the individual discover the rest of the answer.
- Usually, someone will answer the question. If not, either rephrase the question or break it down into a simpler question.
- If there are still no volunteers to answer the question, you might answer the question yourself. The important thing is to later reconsider the question and make sure that the content leading up to the question has enabled the participants to answer it. We want to encourage the participants and set them up for success.

Acknowledging Incorrect Answers

- Always acknowledge the participant and the answer. **Never say, "No**." That will shut down learning and guarantee that no one will volunteer to answer any questions in the future! Instead, say, "Yes, that is correct if the circumstances are x. However, I am asking about these (different) circumstances. In this event, what would the answer be?" In other words, coach the person to discover the correct answer.

- Another option is to take responsibility for any confusion on the part of the person answering the question. "You know, you have answered the question I asked, but I realize I didn't ask the correct question. I apologize. Let me rephrase the question..."

- It is also perfectly acceptable to let an incomplete, but not glaringly wrong answer, go by if you feel that most of the participants know it is not completely correct. However, if it concerns a key concept, you must clarify it so that no one leaves confused. In this case, coach the person to the correct answer by saying "That's an interesting response. Let's test it." Then ask questions to help the answerer discover the consequences of what has been proposed and realize those consequences would not be desirable.

Handling a Monopolizing Participant

- Interrupt, thanking the person for his or her enthusiasm. Indicate that we need to hear what others think about this now.

- Pull the person aside at a break. Acknowledge that s/he is very participative and knowledgeable. You can also suggest that s/he co-facilitate their group by drawing out the answers from the less vocal participants, rather than providing them.

2.12 CREATING SMALL GROUPS

You want to create new groups to generate new energy and knowledge sharing. Any of these eighteen techniques can be used. Almost all of the techniques identify the new groups quite quickly. Techniques #2 and #14 take longer, since they involve having the participants stand up, move, line up, and then count off.

Keep in mind that the first iteration of a technique may not always identify enough participants for a group. For example, there might be only 2 people who have 0 as the last digit of their phone number (see technique #3). In this case, have people raise their hands if they have either 0 or 1 as the last digit. If that doesn't make the resulting group large enough, add those who have 2 as the last digit.

If seven people have 2 as the last digit, it is already large enough to be it's own group. Keep having people raise hands for different ending digits until you find a digit (let's say 6) where there are only a few participants. You would then group those with the last digits of 0, 1 and 6 together to create a group of sufficient size.

1. Count off by the number of groups you want (1, 2, 3 for 3 groups)

2. Ask the participants to line up by the month and day of their birth (not the year!), with January 1 on the left through to December 31st on the right. Then have the participants count off.

3. Ask participants to select the last digit of one of their phone numbers and group people together who share the same last digit. If there aren't enough using one digit, add another digit's group.

4. Place playing cards at each table and have each participant select a card. You can group them by those who selected the same suits: hearts, clubs, diamonds, and spades.

5. Group by birth order in the participants' families: the oldest, the youngest, the middle child, the only child.

6. Have the participant write their names on table tent cards at the beginning of the session. Make sure to have 4 or 5 of the same selection of markers at each table: green, blue, purple, red, black, or some other color assortment. Then group those who have used the same color to write their names together– the blue team, the red team, etc.

7. Group by the first letter in the participants' middle names.

8. Have each person sitting in a table group select a different item from the table (pen, pad of paper, toy, piece of candy, name card, etc.) Then group together those who selected the same item.

9. Group participants by the color of the shirt or blouse they are wearing.

10. Have participants stand next to each other in decreasing height, then have them count off by the number of groups you want to create.

11. Group them by where they were born in the country or in the continent: north, south, east, west, central, etc.

12. To create a maximum of three groups, separate participants by whether they are wearing glasses or contact lenses, or neither.

13. You can split the participants into 2 or 3 groups by identifying which rows or tables of participants are in each group.

14. Have the participants stand in alphabetical order, based on the letter of their first name, and then have them count off.

15. Group participants together who have the same total number of siblings.

16. Group participants who have visited the same number of countries.

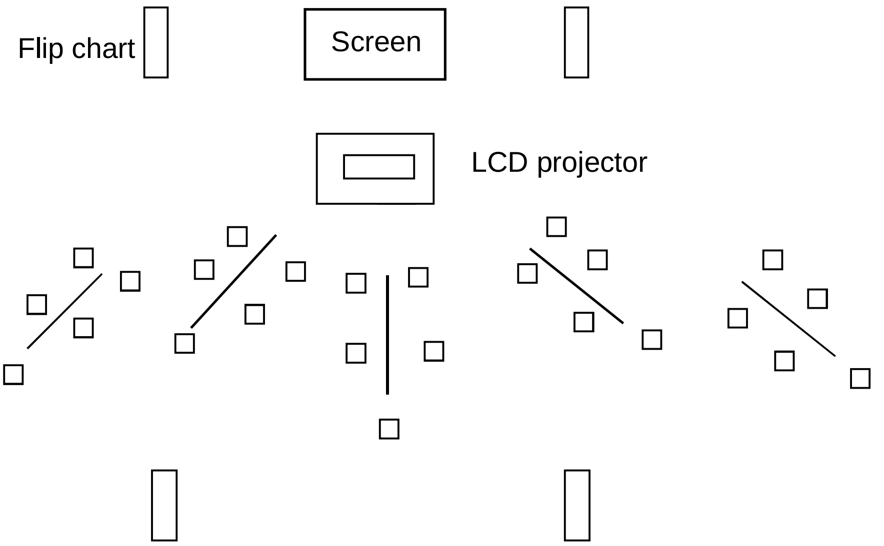
17. Group participants who share the same hobbies: for example, fishing, cooking, reading, exercising, going to movies, doing activities with their families, etc.

18. Ask the participants to select how they would prefer to travel: either by car, by train, by plane, or by boat (assuming you want four groups. You can always add other modes of transportation if you want a larger group: by riding a horse-camel-elephant, by motorcycle, by teleporting, etc.). Group the participants according to their preferred mode of transportation.

2.13 DESIRED ROOM LAYOUT

If possible, the room set-up should have the participants at rectangular (or round) tables. If rectangular, each table should have one end slanted toward the middle front of the room, with four participants seated around the two sides of each table. The screen should be the focal point, with the tables creating a sunburst effect.

The LCD projector should be placed in the middle of a rectangular table that is parallel to the screen:



2.14 TABLE GROUP SIZE

Group participation is most effective when there are no more than five participants at a table. If there are more than five participants at a table, it becomes more difficult for the table members to hear each other. The group dynamic works best if there is an odd number of participants–so if there are less than five at a table, it is better to have groups of three, rather than groups of four.

2.15 EQUIPMENT AND MATERIALS

Necessary Materials

1. Colored markers for each table
2 Table tent name cards
3. Participant manuals (printed on both sides and stapled on the upper left hand side)
4. PowerPoint slides
5. Pens for participants
6. Tape to hang flip charts if they are not self-sticking

Necessary Equipment

1. Flip chart easels with paper
2. LCD projector
3. Screen
4. Clock or watch

Recommended Materials (Optional)

1. Balls or soft beanbags
2. Candy in bowls (including sugar-free)
3. Tactile objects such as pipe cleaners, dice, squeeze balls, etc. (for learners who need to be handling something to learn effectively)
4. Decks of cards (if that is the technique you will use to create small groups)
5. Music for breaks (and something to play the music on)
6. A bell or other noise maker (for activities that require participant groups to move from one flipchart to another)
7. An LCD remote that can make the slides go forward and back, darken the slides to avoid distraction when there is no need for the participants to view the slides, and has a laser pointer function
8. Sticky notes (for participants to write questions and post them on the "Parking Lot" flipchart)
9. PowerPoint countdown timer (available as free downloads on the internet)

ANNEX A: MODULE DESCRIPTIONS

MODULE 1: HEALTH PRACTICE AS A BUSINESS

Purpose:

If you are a health professional who manages and staffs a small-scale private medical practice, you focus your time and energy on providing quality health services. That makes sense, because that is your area of expertise. However, you have another area of responsibility that you may not be prepared to fulfill. Your practice is actually a business that must be managed. Running a small-scale medical practice poses a number of management and financial challenges. Health professionals often lack the business and financial management knowledge and skill necessary to sustain and grow their practices.

This practical skill-building course is intended to help you learn what it means to be an owner or owner/manager of a business, how to handle potential conflicts between business necessity and medical ethics, and how to determine where you want your business to go.

What You Will Learn:

During the course, you will:

a. Define what it means to be in business;
b. Discuss the potential conflict between business needs and medical ethics;
c. Plan how to manage this potential conflict;
d. Describe the key concerns of business at different stages of development;
e. Determine the current and desired stage of your business; and
f. Plan your next step

Who Should Attend:

The course is designed for owners, partners and general managers of small-scale private health facilities who want to better understand their roles as owners and managers of a private practice.

MODULE 2: WHAT IT MEANS TO BE A BUSINESS OWNER

Purpose:

If you recognize that your medical practice is a business that must be managed, then you realize that you are, in fact, a business owner/manager. Since you are trained as a health professional, you may feel less confident in your business management knowledge and ability. However, if you want to have a successful and profitable practice, it will be helpful for you to know what an effective business owner is expected to do. You need to know the tasks and competencies of a business owner so that you can play to your strengths and address your weaknesses.

This practical skill-building course is intended to help you assess your knowledge, skill and abilities against the responsibilities of a business owner/manager. As a result, you will know what you need to do to increase your confidence and competence as a business owner/manager.

What You Will Learn:

During the course, you will:

a. Clarify the responsibilities of a business owner;
b. Discuss how to handle the responsibilities necessary to manage a business;
c. Assess which characteristics of successful small business owners you possess;
d. Propose what you can do to increase your effectiveness as a small business owner; and
e. Plan your next step

Who Should Attend:

The course is designed for owners, partners and general managers of small-scale private health facilities who want to better understand their roles as owners and managers of a private practice.

MODULE 3: THE IMPACT OF PERSONALITY

Purpose:

Your personality affects how you manage your business. Knowing the personalities of your staff and how best to handle the different personalities of your patients can help you minimize or address potential conflicts and misunderstandings that can affect the success of your business.

This practical skill-building course will teach you how to identify, communicate with, persuade, and minimize misunderstandings and conflicts with different personalities using the Five Factor Model. It will also enable you to identify your own personality so that you can assess its impact on your business decisions and operations.

What You Will Learn:

During the course, you will:

a. Review the Five Factor Model personality factors;
b. Determine their Five Factor Model personality profile;
c. Assess the impact of their personality on their business decisions;
d. Analyze personality trait similarities or differences that contribute to misunderstandings on an individual and business team basis;
e. Recommend how to improve communication in those situations; and
f. Plan your next step.

Who Should Attend:

The course is designed for owners, partners and general managers of small-scale private health facilities who want to better understand their roles as owners and managers of a private practice.

MODULE 4: DEFINING YOUR HEALTH PRACTICE BUSINESS

Purpose:

If you want to attract and retain your clients so that your business is successful and your employees are supportive, you need to distinguish your health practice from others in the area. You can accomplish that by making strategic decisions regarding how your practice presents itself, what it does, and how it is perceived by your employees, clients, the community, and other businesses.

This practical skill-building course will teach you how to identify the key focus of your business, create a strategic vision that clarifies that focus, discuss how to create an effective business identity, and set goals to implement that vision. Doing so will enable you to have a clear idea of what you want your business to be, and what it will take to accomplish that vision.

What You Will Learn:

During the course, you will:

a. Identify the key focus of your business;
b. Define what a strategic vision is;
c. Describe the characteristics of a good strategic vision;
d. Create or revise a strategic vision for your business;
e. Discuss the components of an effective business identity;
f. Explain how to set short-term and long-range goals to implement your strategic vision;
g. Set short-term and long-range goals for your business;
h. Select a short- term goal on your action plan that will be a quick win; and
i. Plan your next step.

Who Should Attend:

The course is designed for owners, partners and general managers of small-scale private health facilities who want to better understand their roles as owners and managers of a private practice.

MODULE 5: MANAGE THE GROWTH OF YOUR HEALTH PRACTICE

Purpose:

Are you satisfied with the current size of your health practice? Have you thought about growing? Do you know the ultimate size and scope you want your business to achieve? There are many ways to grow a business. Whether or not you are ready to grow your business right now, it would be wise to think about what type of growth is important to you. If you don't set a goal and put actions in place to accomplish it, your desired growth may never happen.

This practical skill-building course will teach you the pros and cons of growing your health practice, help you recognize potential growth opportunities, and prompt you to assess your readiness for taking advantage of those opportunities.

What You Will Learn:

During the course, you will:

a. Discuss what it means to grow your health practice;
b. Identify the pros and cons of different types of growth;
c. Define the desired size and scope of your practice;
d. Recognize potential growth opportunities;
e. Assess your readiness to take advantage of potential growth opportunities; and
f. Plan your next step.

Who Should Attend:

The course is designed for owners, partners and general managers of small-scale private health facilities.

MODULE 6: MANAGE HUMAN RESOURCES

Purpose:

If you want your practice to be successful, you will need to make sure that your employees are qualified and enthusiastic, and either support or provide health care services in a manner that does credit to your practice. To do so, you will have to be a knowledgeable and competent employer.

This practical skill-building course will teach you how to fulfill your role as an employer with specific responsibilities to attract, hire, manage, and retain qualified staff to ensure that both your staff and your business will be successful.

What You Will Learn:

During the course, you will:

a. Analyze what employees need to be successful on the job;
b. Explain why managing human resources is essential to a successful business;
c. Write a job description;
d. Describe how to recruit and select staff;
e. Determine what should be included in staff orientation;
f. Review a performance management process;
g. Assess how your approach to human resource management affects employee morale and retention; and
h. Plan your next step.

Who Should Attend:

The course is designed for owners, partners and general managers of small-scale private health facilities who want to better understand their roles as owners and managers of a private practice, as well as any staff who are involved in the recruitment, selection, orientation, training, management and/or evaluation of employees.

MODULE 7: MANAGE MEDICATIONS AND MEDICAL SUPPLIES

Purpose:

When your practice provides medications or medical supplies to your patients, you want to make very sure that what you are giving them is not damaged, contaminated or expired. The only way you can ensure this is by having a well-organized system to receive, store, retrieve and dispense them.

This practical skill-building course will teach you best practices for managing medications and medical supplies to ensure that they are adequately stored and audited for quality and effective date prior to dispensing them to patients.

What You Will Learn:

During the course, you will:

a. Identify the types of medications and medical supplies you keep on hand;
b. Discuss the importance of the first-to-expire, first out (FEFO) procedure;
c. Explain how to record stock items;
d. Describe your approach to conducting an inventory;
e. List the indicators of product quality problems;
f. Propose how to prevent damage and contamination; and
g. Plan your next step.

Who Should Attend:

The course is designed for owners, partners and general managers of small-scale private health facilities, as well as staff who are involved in receiving, inspecting, storing, retrieving and dispensing medications and medical supplies.

MODULE 8: MANAGE MEDICAL RECORDS

Purpose:

If you want your patients to receive the very best care possible, your clinicians need to have the most current, complete, and accurate patient information as possible. Otherwise, they can put your practice at risk by prescribing medication that provokes an allergic reaction, omitting to follow up on lab reports that might indicate a life-threatening illness, etc. This course can help you to avoid these risks.

This practical skill-building course will teach you how to ensure that your patient medical records are complete, well organized, legible, secure, and easy to retrieve. You will also learn how to periodically audit the records for data completeness and documented quality of services to ensure that your patients will receive the best quality of care.

What You Will Learn:

During the course, you will:

a. Propose the patient information and forms that should be included in outpatient medical records;
b. Recommend how an outpatient medical record can be organized;
c. Assess the content of your current medical records;
d. Discuss your current medical records policies and procedures;
e. Assess your current medical records policies and procedures;
f. Design a checklist for auditing the completeness of medical records;
g. Design a peer review checklist for auditing the quality of medical records;
h. Assess your current medical records management; and
i. Plan your next step.

Who Should Attend:

The course is designed for owners, partners and general managers of small-scale private health facilities, as well as staff who are responsible for creating, updating and maintaining medical records.

MODULE 9: MANAGE YOUR FACILITY

Purpose:

The first things that patients notice are your facility and your equipment. If either is poorly maintained, potential patients may choose to go elsewhere. In addition, unclean exam rooms, safety hazards, and mishandling of medical waste can present even greater risks to the viability and success of your practice.

This practical skill-building course will teach you what you need to do to effectively manage and maintain your facility and medical equipment. Doing so will enable you to ensure that you provide health care services in a safe, accessible, clean, secure, and well-maintained facility.

What You Will Learn:

During the course, you will:

a. Discuss what your facility can do to have a positive first impression on your patients and visitors;
b. Identify four areas of concern in facility management;
c. Rate the cleanliness of your facility;
d. Explain basic clinical equipment maintenance procedures;
e. Review a building maintenance checklist;
f. Discuss facility safety issues and procedures;
g. Explain your security measures;
h. Share waste management methods; and
i. Plan your next step.

Who Should Attend:

The course is designed for owners, partners and general managers of small-scale private health facilities, as well as staff who are responsible for the management and maintenance of the facilities and equipment.

MODULE 10: MANAGE RISK IN YOUR HEALTH PRACTICE

Purpose:

How well are you managing the various risks involved in owning and managing a health practice? The potential for risk permeates all aspects of health care, including management, medical mistakes, record keeping, and facility management. Are you doing everything you can to minimize your risks in telephone communications, credentialing, medication management, and privacy and confidentiality?

This practical skill-building course will teach you to be aware of potential risks that permeate all aspects of health care, so that you will take proactive risk management actions to identify and address them before they occur.

What You Will Learn:

During the course, you will:

a. Define risk management;
b. Assess the need for telephone protocols;
c. Create a credentialing checklist;
d. Review the consequences when the "Six Rights" of medication management are not fulfilled;
e. Describe your privacy and confidentiality practices;
f. Discuss the relationship between risk management and improvement in a health practice; and
g. Plan your next step.

Who Should Attend:

The course is designed for owners, partners and general managers of small-scale private health facilities, as well as staff who are responsible for risk management policies and procedures.

MODULE 11: UNDERSTAND QUALITY IN YOUR HEALTH PRACTICE

Purpose:

There is an expectation and necessity for your practice to provide quality health care. In the past, doctors have typically been the ones to determine the quality of care. Today, in addition to the decisions and actions of clinicians, the safety and quality of patient care depends on the reliability and effectiveness of the business processes and systems. Quality is not just the right thing to do, it makes good business sense because it can help you attract and retain clients.

So, what are you doing to ensure quality in your health practice? Do you know where to focus your attention to make sure that your practice provides quality care?

This practical skill-building course will teach you how to identify and implement clinical, fiscal, and administrative quality standards of performance that will ensure that your practice provides a high quality of care. This training focuses on quality from a business and operations perspective and is not a clinical training in quality improvement.

What You Will Learn:

During the course, you will:

a. Discuss what quality of health care services mean to you;
b. Describe three key focus areas of quality in health care;
c. Propose administrative quality standards for a small health care practice;
d. Propose fiscal quality standards for a small health care practice;
e. Propose clinical quality standards for a small health care practice;
f. Determine where your practices do not meet these proposed quality standards; and
g. Plan your next step.

Who Should Attend:

The course is designed for owners, partners and general managers of small-scale private health facilities, as well as staff who are responsible for administrative, fiscal and clinical services.

MODULE 12: ESTABLISH A PATIENT-SAFETY CULTURE

Purpose:

There are many possible adverse events that can affect patients, visitors, and staff. These events range from those that result in extreme harm to those that have minimal impact. Too often, health care staff are hesitant to report these incidents, for fear of being blamed. However, you want to ensure that your facility and practices are safe, so you need to know about these events. You'll be relieved to know that there is a way to encourage incident reporting.

This practical skill-building course will teach you how to ensure patient safety by establishing an Incident Reporting System where you and your staff can learn from adverse events so that they do not occur in the future.

What You Will Learn:

During the course, you will:

a. Define the adverse incidents that can affect patients, visitors and/or staff;
b. Review the consequences when adverse incidents that affect patients, visitors and/or staff are not reported;
c. Define a "patient-safety culture";
d. Describe an incident reporting system;
e. Explain how to set up an incident reporting system;
f. Plan how to promote a patient-safety culture; and
g. Plan your next step.

Who Should Attend:

The course is designed for owners, partners and general managers of small-scale private health facilities, as well as any staff who come into contact with patients and/or visitors.

MODULE 13: ENSURE QUALITY AT EVERY STAGE OF A PATIENT'S EXPERIENCE

Purpose:

A patient's experience with your practice begins when the patient schedules an appointment. There are actions and decisions made by your staff from the minute that patient enters your facility until the minute that patient leaves. If you refer the patient to a specialist or a laboratory, the patient's experience with your practice continues up to and possibly after you receive, review and discuss further treatment or medical action in response to the lab results.

The key question is: Would you want your mother to be treated the same way as your patients are treated? If the answer is anything but "yes," you will want to do something about it.

This practical skill-building course will teach you how to define expectations at every step of a typical patient consultation in your practice (before, during, and after), and make sure that they are met on a consistent basis.

What You Will Learn:

During the course, you will:

a. Reconstruct and review every step related to a typical patient consultation in your practice;
b. Determine how well your practice currently handles every step of a patient consultation;
c. Describe the quality improvement cycle: plan–do–check–act;
d. Plan how to use the data from the Incident Reports and the PDCA cycle to improve the quality of services;
e. Summarize quality assurance and improvement techniques you can use in your practice; and
f. Plan your next step.

Who Should Attend:

The course is designed for owners, partners and general managers of small-scale private health facilities, as well as any staff who come into contact with patients.

MODULE 14: UNDERSTAND THE IMPORTANCE OF FINANCIAL INFORMATION

Purpose:

Do you know how well your business is doing financially? Does your bookkeeper or accountant provide you with financial statements? Do you know where that information comes from? Do you know how to interpret those financial statements? Are you able to have a meaningful conversation with your bookkeeper or accountant so that you know how much profit or loss is occurring in your business, and what your equity is?

This practical skill-building course will teach you how a record-keeping system can help you manage your revenue and costs. It will also help you become sufficiently familiar with financial statements so you can have meaningful conversations with your bookkeeper or accountant.

What You Will Learn:

During the course, you will:

a. Assess your current financial record-keeping systems;
b. Discuss the components of an effective financial record-keeping system;
c. Identify the financial records your practice should keep;
d. Analyze an income statement;
e. Determine the value of a balance sheet;
f. Plan questions to ask your bookkeeper/accountant on a regular basis; and
g. Plan your next step.

Who Should Attend:

The course is designed for owners, partners and general managers of small-scale private health facilities, as well as any staff who are involved with financial records and generate financial statements.

MODULE 15: UNDERSTAND YOUR COSTS AND PROFITABILITY

Purpose:

Do you know how your costs affect your profitability? Are you keeping track of your costs? If you had to reduce your costs by 10%, could you do that? In order to do so, you would have to know the factors that impact your costs, and you would have to be able to identify the costs that you can control. You would also need to know how to control those costs.

This practical skill-building course will teach you how to notice, manage and audit your costs so that your practice can be profitable.

What You Will Learn:

During the course, you will:

a. Explain the difference between costs and expenses;
b. Describe the two types of costs;
c. Analyze costs and cost drivers;
d. Discuss how to control costs;
e. Define profit;
f. Assess how cost adjustments can affect profitability;
g. Explain how to conduct a cost management audit; and
h. Plan your next step.

Who Should Attend:

The course is designed for owners, partners and general managers of small-scale private health facilities, as well as any staff who are involved with setting costs.

MODULE 16: MANAGE PAYMENTS AND COLLECTIONS

Purpose:

Inefficient payments and collections policies and procedures can cause your practice to lose money. In order to control for these inefficiencies, your staff needs to be trained to implement an upfront payment and collections policy. Your patients need to be educated regarding their financial responsibilities. You also need to make sure that your practice is adequately handling insurance claims.

This practical skill-building course will teach you how to prevent your practice from losing money by instituting an upfront payment and collections management system.

What You Will Learn:

During the course, you will:

a. Discuss why private medical practices lose money;
b. Identify the steps involved in effectively managing payments and collections;
c. Determine the key components of an upfront payment and collections policy;
d. Explain the staff training necessary to implement the policy;
e. Propose how to educate patients regarding their financial responsibilities;
f. Assess the value of a financial assistance program;
g. Review how well your practice handles the steps involved in managing insurance claims; and
h. Plan your next step.

Who Should Attend:

The course is designed for owners, partners and general managers of small-scale private health facilities, as well as any staff who are involved with payments and collections.

MODULE 17: MANAGE YOUR CASH FLOW

Purpose:

Are you wondering why you don't have the funds you need even though your practice has been thriving? It is possible for your health practice to show a profit and still be cash poor. Bills are paid with cash, not profits, and a lack of cash can drive a "profitable" practice out of business. Good financial management requires understanding your cash needs and knowing when, where, and how they will occur.

This practical skill-building course will teach you how to work with cash flow statements to determine the financial health of your business. You will also learn how to anticipate your cash flow needs and take action to improve your cash flow.

What You Will Learn:

During the course, you will:

a. Define key terms related to cash flow and profit;
b. Explain the difference between cash and profit;
c. Describe the categories in a cash flow statement;
d. Interpret a cash flow statement;
e. Practice making cash flow projections;
f. Identify strategies to improve cash flow; and
g. Plan your next step.

Who Should Attend:

The course is designed for owners, partners and general managers of small-scale private health facilities, as well as any staff who are involved with finances.

MODULE 18: DEVELOP AN OPERATING BUDGET

Purpose:

Would you like to have a clear picture of the expenses of running your business? Would it be helpful to know how to limit expenses so that funds are not wasted on unessential items, and so your practice does not overpay for the resources you use? An operational budget will give you this information.

This practical skill-building course will teach you how to create and monitor an operating budget in the interest of sound financial management for your practice.

What You Will Learn:

During the course, you will:

a. Define what an operating budget is;
b. Describe the elements of an operating budget;
c. Analyze a budget;
d. Discuss how to construct an operating budget;
e. Make sales projections;
f. Create an operating budget; and
g. Plan your next step.

Who Should Attend:

The course is designed for owners, partners and general managers of small-scale private health facilities, as well as any staff who are involved with finances.

MODULE 19: FUND YOUR PRACTICE

Purpose:

Savings from profit is usually not enough to grow a business. So, is it better to use your savings, or to borrow and invest in your business? If you want to grow your business, you will need to know what your financing options might be. How can you decide what is your best option? There are factors that you may want to consider when you are selecting a financing option.

This practical skill-building course will teach you how to identify potential financing options and assess their relative advantages and disadvantages, so that you can select the funding option that has the least adverse consequences for your practice.

What You Will Learn:

During the course, you will:

a. Address objections to borrowing money;
b. Define and distinguish internal and external financing options;
c. Discuss the pros and cons of different financing options;
d. Assess the best way to meet funding needs;
e. Select financing options; and
f. Plan your next step.

Who Should Attend:

The course is designed for owners, partners and general managers of small-scale private health facilities, as well as any staff who are involved with finances.

MODULE 20: UNDERSTAND THE MARKET

Purpose:

Your patients are not just sick people, but they are also paying customers and organizations. In order to serve these clients, you need to know why they come to your practice, and what their needs, wants, and expectations are. You also need to know how competitive your practice currently is, and how to help your practice become more competitive in your health care market.

This practical skill-building course will teach you how to identify your customers, assess your competition, and take steps to become more competitive in your market.

What You Will Learn:

During the course, you will:

a. Identify who your customers are;
b. Rank the factors that made your customers choose you;
c. Analyze why it is important to know who your customers are;
d. Determine who your competition is;
e. Describe how to be more competitive in your market; and
f. Plan your next step.

Who Should Attend:

The course is designed for owners, partners and general managers of small-scale private health facilities, as well as any staff who are involved with marketing.

MODULE 21: PRICE YOUR PRODUCTS AND SERVICES

Purpose:

How do you currently decide how to price your products or services? How do you determine if you are charging too much or too little? Do you have pricing goals? Do you know how to identify your minimal affordable price, your break-even price, or your price floor? There are many ways to set prices, but you need to consider your customers and costs when you set them.

This practical skill-building course will teach you how to set pricing goals, select the best pricing strategies for your practice, calculate prices, and decide how and when to adjust your prices so that your practice will see a profit.

What You Will Learn:

During the course, you will:

a. Discuss your current price-setting practices;
b. Explain different price-setting strategies;
c. Identify your pricing objectives;
d. Debate the value of uniform versus differentiated prices;
e. List the number of different ways to price a product or service;
f. Conduct a break-even analysis;
g. Practice setting prices;
h. Define key pricing terms;
i. Analyze how varying prices can benefit your health practice; and
j. Plan your next step.

Who Should Attend:

The course is designed for owners, partners and general managers of small-scale private health facilities, as well as any staff who are involved with marketing.

MODULE 22: MARKET YOUR HEALTH PRACTICE

Purpose:

How much time and money do you spend on your marketing efforts? How constant is your marketing effort? Do you know how to tell when you need to be marketing your practice? Is your marketing approach effective?

There are many different marketing strategies that can help you effectively communicate the value of your health practice to the patients you want to attract. Quite a few of these marketing strategies do not require any monetary investment.

This practical skill-building course will teach you how to decide which marketing strategies will be comfortable for you and your practice so that you can attract and keep customers.

What You Will Learn:

During the course, you will:

a. Define the difference between marketing and advertising;
b. Explain why it is always important to market your health practice;
c. Describe different marketing strategies;
d. Assess which marketing strategies would be most effective for your health practice and most comfortable for you and your customers; and
e. Plan your next step.

Who Should Attend:

The course is designed for owners, partners and general managers of small-scale private health facilities, as well as any staff who are involved with marketing.