SYLLABUS

CPH 569: Fundamentals of Health Budgeting and Financial Management

Fall 2014

Time: Tuesday 3:00-5:50 (there will be a 15 min break half way through class, please feel free to bring a snack)

Locations: Tucson Location: The College of Nursing, Room 470
Phoenix Location: The College of Medicine, T-health Classroom

Instructor: Gail Barker, PhD, MBA
Ph: 602-827-2531
Email: barkerg@email.arizona.edu
Office: COM - Phoenix, Bldg 4, Suite 119, Rm C

Teaching Assistant: Alejandra (Ali) Gabriel, MPH, CPH, DrPH student
Email: akgabrie@email.arizona.edu

Office Hours: By appointment

Catalog Description: This course will offer a current approach to the fundamentals of budgeting and financial management, with an emphasis on non-profit and health care organizations, in particular the community health sector.

Course Prerequisites: None but basic knowledge of Microsoft Excel is preferred.

Learning Objectives: This course is intended to provide fundamental budget and financial management skills required for successful leadership for community health and non-profit organizations. With emphasis on community health and non-profit business concepts:
1) Understand the fundamentals of financial management
2) Construct different types of budgets and study budget processes
3) Learn financial accounting principles and reports
4) Develop a business plan
5) Debate the role of ethics in financial management
6) Understand how financial reports are used for management decision-making
7) Recognize the nuances of health care reimbursement
MPH Core Competencies Addressed:
- Defining a problem
- Determining appropriate uses and limitations of data
- Understanding how data illuminate ethical, political, scientific, economic and overall public health issues
- Making relevant inferences from data
- Effective oral and written communication skills
- Soliciting input
- Developing and presenting a budget
- Monitoring program budgets

HSA, PHPM and PHP Core Competencies Addressed:
- Successfully participating in financial management of the organization
- Interpersonal communications leadership
- Engaging in both quantitative and qualitative analysis utilizing finance
- Understanding legal and ethical environments to carry out an achieve organizational goals

DrPH Competencies Achieved:
- Identify and distribute sources of funding for public health activities
- Communicate effectively with community members

Note: DrPh students are expected to submit all homework assignments individually. DrPH students must also write a policy brief defending or recommending changes to the government accounting standards. The policy brief should be no less than 5 pages, be well researched and be ready to present to a member of Congress.

Course Notes: Course notes will be distributed throughout the semester during class. They will also be available directly from the instructor.


Course Requirements: By the end of the semester students must demonstrate knowledge of financial management and accounting principles, be able to construct different types of budgets, be able to read, understand and use financial reports and compile a business plan. Students are required to complete all assignments on the respective due date as detailed in the course schedule. Late assignments will not be accepted.

Grading/Student Evaluation:
90-100 = A
80-89 = B
70-79 = C
60-69 = D
**Co-Convened Courses:** DrPH students will perform all assignments individually. DrPH students will also prepare a policy brief defending or recommending changes to the government accounting standards.

**Workload Weighting:**
Participation and weekly quiz = 26% (24% DrPH)
Other assignments = 51% (46% DrPH)
Group final presentation and project = 23% (30% DrPH)

**Class Participation/Participation:** Students are expected to attend all class sessions and actively participate in class discussions and activities. No more than 2 classes can be missed to successfully complete the course. All class absences will result in a loss of the week’s attendance point and homework should be uploaded to course dropbox by the weekly deadline to obtain homework points. Students missing a class should make arrangements to take the weekly quiz by midnight the following Monday (and by 2:30 pm before the subsequent Tuesday class.)

**Course Schedule:** All weekly assignments will be available at the end of the week’s lectures.

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<thead>
<tr>
<th>Wk #</th>
<th>Course Assignments*</th>
<th>Workload Points</th>
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<tbody>
<tr>
<td>Week 1</td>
<td>Read Ch.1 and perform assigned homework at the end of lecture. Homework due 9/2 at 6:00 pm.</td>
<td>1 pt attendance &amp; 1 pt participation 3 pts homework</td>
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<tr>
<td>8/26</td>
<td>B-P</td>
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<td>G-T</td>
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<tr>
<td>Week 2</td>
<td>Read Ch 2 and perform assigned homework at the end of lecture. Guest lecturer (Kelly) at 3:00. Work due 9/9 at 6:00 pm.</td>
<td>1 pt attendance &amp; 1 pt participation 3 pts homework</td>
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<td>9/2</td>
<td>B-T</td>
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<td>G-P</td>
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<tr>
<td>Week 3</td>
<td>Read Ch 3 and perform assigned homework at the end of lecture. Work due 9/16 at 6:00 pm.</td>
<td>1 pt attendance &amp; 1 pt participation 5 pts homework</td>
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<td>9/9</td>
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<td>Week 4</td>
<td>Read Ch 4 and perform assigned homework at the end of lecture. Work due 9/23 at 6:00 pm.</td>
<td>1 pt attendance &amp; 1 pt participation 5 pts homework</td>
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<td>9/16</td>
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<td>Week 5</td>
<td>Read Ch 5 and perform assigned homework at the end of lecture. Work due 9/30 at 6:00 pm.</td>
<td>1 pt attendance &amp; 1 pt participation 5 pts homework</td>
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<td>9/23</td>
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<td>Week 6</td>
<td>Read Ch 6 and perform assigned homework at the end of lecture. Work due 10/7 at 6:00 pm.</td>
<td>1 pt attendance &amp; 1 pt participation 3 pts homework</td>
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<tr>
<td>9/30</td>
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<tr>
<td>Week 7</td>
<td>Read Ch 7 and perform assigned homework at the end of lecture. Work due 10/14 at 6:00 pm.</td>
<td>1 pt attendance &amp; 1 pt participation 3 pts homework</td>
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<td>10/7</td>
<td>B-P</td>
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<td>Week 8 – 10/14</td>
<td>Read Ch 8 and perform assigned homework at the end of lecture. Work due 10/21 at 6:00 pm</td>
<td>1 pt attendance &amp; 1 pt participation 4 pts homework</td>
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<td>Week 9 – 10/21</td>
<td>Read Ch 10 and perform assigned homework at the end of lecture. Work due 10/28 at 6:00 pm.</td>
<td>1 pt attendance &amp; 1 pt participation 3 pts homework</td>
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<td>Week 10 – 10/28</td>
<td>Read Ch 11 and perform assigned homework at the end of lecture. Work due 11/4 at 6:00 pm.</td>
<td>1 pt attendance &amp; 1 pt participation 5 pts homework</td>
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<td>Week 11 – 11/4</td>
<td>Read Ch 15 and perform assigned homework at the end of lecture. Work due 11/18 at 6:00 pm.</td>
<td>1 pt attendance &amp; 1 pt participation 6 pts homework</td>
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<td>Week 12 – 11/11</td>
<td>Veteran’s Day Holiday – no class</td>
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<td>Week 13 – 11/18</td>
<td>Read Ch 12 and perform assigned homework at the end of lecture. Guest Lecturer (Betlach). Work due 12/2 at 6:00 pm.</td>
<td>1 pt attendance &amp; 1 pt participation 6 pts homework</td>
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<td>Week 14 – 11/25</td>
<td>Thanksgiving week – no class, use time to work on final projects</td>
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<td>Week 15 – 12/2</td>
<td>Read Ch 13-14 and work on final projects. Final Projects and presentations are due 12/9.</td>
<td>1 pt attendance &amp; participation</td>
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<td>Week 16 – 12/9</td>
<td>Group papers due (maximum 10-15 pages plus appendices). Stock Watch finale and class feedback presentation. DrPH students also prepare a policy brief defending or recommending changes to the government accounting standards</td>
<td>1 pt attendance &amp; participation 18 pts final project and 5 pts presentation 10 pts, DrPH project</td>
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**Communications:** You are responsible for reading emails sent to your UA account from your professor and the announcements that are placed on the course web site. Information about readings, news events, your grades, assignments and other course related topics will be
communicated to you with these electronic methods. The official policy can be found at: http://www.registrar.arizona.edu/emailpolicy.htm

Disability Accommodation: If you anticipate issues related to the format or requirements of this course, please meet with me. I would like us to discuss ways to ensure your full participation in the course. If you determine that formal, disability-related accommodations are necessary, it is very important that you be registered with Disability Resources (621-3268; drc.arizona.edu) and notify me of your eligibility for reasonable accommodations. We can then plan how best to coordinate your accommodations. The official policy can be found at: http://catalog.arizona.edu/2014-2D15/policies/disability.htm

Academic Integrity: All UA students are responsible for upholding the University of Arizona Code of Academic Integrity, available through the office of the Dean of Students and online: The official policy found at: http://deanofstudents.arizona.edu/codeofacademicintegrity

Classroom Behavior: (Statement of expected behavior and respectful exchange of ideas) The Dean of Students has set up expected standards for student behaviors and has defined and identified what is disruptive and threatening behavior. This information is available at: http://deanofstudents.arizona.edu/disruptiveandthreateningstudentguidelines

Students are expected to be familiar with the UA Policy on Disruptive and Threatening Student Behavior in an Instructional Setting found at: http://policy.arizona.edu/disruptive-behavior-instructional and the Policy on Threatening Behavior by Students found at: http://deanofstudents.arizona.edu/sites/deanofstudents.arizona.edu/files/Disruptive_threat_bklt_2012.pdf

Grievance Policy: Should a student feel he or she has been treated unfairly, there are a number of resources available. With few exceptions, students should first attempt to resolve difficulties informally by bringing those concerns directly to the person responsible for the action, or with the student's graduate advisor, Assistant Dean for Student and Alumni Affairs, department head, or the immediate supervisor of the person responsible for the action. If the problem cannot be resolved informally, the student may file a formal grievance using the Graduate College Grievance Policy found at: http://grad.arizona.edu/academics/policies/academic-policies/grievance-policy

Grade Appeal Policy: http://catalog.arizona.edu/2014-15/policies/gradappeal.htm

UA Smoking and Tobacco Policy: The University's "Smoking and Tobacco Policy" is designed to promote the health and wellness of all members of the University community, including visitors to campus, and it will prohibit the use of tobacco- and nicotine-containing products on property owned or controlled by the UA. This includes the main campus, the Arizona Health Sciences Center, the Phoenix Biomedical Campus, UA South, all satellite campuses, University vehicles, and any property leased by the UA. Smoking cessation aids, such as nicotine gum, patches, and nasal sprays, will be permitted, but all other forms of tobacco or nicotine - including pipes, cigars, cigarettes and e-cigarettes, all types of smokeless tobacco, and water pipes - will be prohibited. The latest version of the
policy is available at: http://policy.arizona.edu/sites/default/files/Tobacco-Free.pdf

Syllabus Changes: Information contained in the course syllabus, other than the grade and absence policies, may be subject to change with reasonable advance notice, as deemed appropriate.

Telephone and Computer Use: You are allowed to have your computer on during class while doing course work. If it is determined a student is using his/her computer for functions that are not part of the classroom activities, all students will be asked to turn off their computers until there is a specific computer activity assigned by the instructor. Turn your cell phones to silent or vibrate in order to not disrupt the class or disturb your fellow students. The class break can be used to check and return emails, texts, and phone calls etc.

Plagiarism: What counts as plagiarism?
• Copying and pasting information from a web site or another source, and then revising it so that it sounds like your original idea.
• Doing an assignment with a friend and then handing in separate assignments that contain the same ideas, language, phrases, etc.
• Quoting a passage without quotation marks or citations, so that it looks like your own.
• Paraphrasing a passage without citing it, so that it looks like your own.
• Hiring another person to do your work for you, or purchasing a paper through any of the on- or off-line sources.

Class Misconduct: Any class misconduct will result in the loss of all of the assignment points for the first infraction and removal from class for the second infraction.

Instructor Email Communication:
• Please contact me via email at: barkerg@email.arizona.edu
• You MUST complete the subject line of your email with the Course Number: CPH569
• Allow 48 hours for a response time (M-F). If I do not reply to you within 48 hours (excluding weekends), assume I did not get your email and resend.
• Please note, you must plan your questions with response times in mind