

Due: End of Week 1

Organizational Profile

Project Foundations Management Toolkit: Week 1

Your first team assignment will not only set the stage for your project, but will also enable you to share what you know about your organization in your initial mentor meeting and upcoming class discussions; you will also draw on the resulting bank of information in later work (such as for your final poster). Start working on it as soon as you can. Apart from the second item, answers can be in note form. If a given item does not apply, note N/A. If you do not know a numerical answer, use a range or order of magnitude, and create a follow-up task for your team to find the answer.

For this task, focus on the organization, rather than your project.

Name of organization	
Complete 2 or 3 sentence overview of the organization: main activities; products or services; business model (& main sources of revenue).	
Organization's mission, in a sentence or phrase	
Year founded	
Number of employees	
Number of sites (also list countries if relevant)	
Number of customers or patients served (e.g. per month or year)	
Who founded it and are they still involved?	
Who runs it? List top leader or leaders	
Describe the setting in which the organization operates (e.g. urban, rural; US based, etc.)	
Whom does it serve? In other words, who are its customers or patients, in general?	
Where on the care delivery value chain does the organization focus? If it provides patient care, what level? (e.g. primary, prevention, specialty tertiary)	
Which health conditions does the organization focus on?	
What is the overall capacity utilization for the organization? (qualitative answer OK for now)	

Deeper data wish list: You need not complete this part by the deadline, but as you work on the table, please note responses to as many of these questions as you can. Share everything with your mentor at your next meeting so you can create a plan to learn more as needed

Competitive environment and market

- What other organizations offer similar services in the area? In other words, who are the competitors? Describe any significant collaborations with other organizations or institutions.
- What is your organization's market share?
- How does the organization acquire new customers or patients? In other words, how does the organization market itself?
- How well does it retain customers or patients?
- How do the organization's prices compare?
- Is their pricing appealing? What else contributes to product or service appeal?

Management systems and data

- What **outputs** is *the organization* currently measuring that tracks how well it is performing? E.g. Patients served, commodities distributed, loss to follow up, check-in to check-out times, waitlist length, patient death or complication rates, etc.
- In the above and next two questions, underline those measures that relate to **health outcomes**.*
- What **data** do *you* think is needed to better monitor and manage this organization's performance? What data would indicate their development as an enterprise?
- What additional items would **your host like to measure**? For instance, what output or performance data do you think your host would agree would allow others to understand the organization's performance?

Patient population/customer base

- Types of patients served (disease type, socio-economic attributes, etc)
- Number of patients served (over time and by type)
- Utilization patterns for host organization (e.g. geographic or temporal variations)
- Catchment area (geographic and/or population)
- Any assessment of market saturation/unmet need
- Any other available demographic data for patients/customers

Human resources

- Headcount/FTEs: Doctors; nurses; community health workers and other health workers (note levels of training, and for each, whether paid)
- Count of non-medical staff-note their roles
- Staff turnover: describe and quantify if possible. Why do staff leave and where do they go?
- How are employees and volunteers trained? What is their background and experience?

Other assets

- Describe key tangible assets: Key facilities, for instance.
- Intangible assets? Political capital, operational expertise, etc.

What else?

- What other profile information do you consider important? Please list any ideas and add any corresponding data.

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