



HEALTH PROGRAM MANAGEMENT

From Development Through Evaluation

Second Edition

BEAUFORT B. LONGEST, JR.

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For Carolyn
Praiseworthy

Health Program Management

From Development Through Evaluation

Second Edition

Beaufort B. Longest, Jr.

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Preface

This book is about managing health programs. Effective management of programs is important because these are mechanisms through which a great many health services are organized and provided in both the public health and health care sectors. I provide information drawn from management research to assist you in developing a comprehensive approach to the practice of management in health programs. A focused reader will take away a solid overview of the current best practices in management that apply to managing health programs.

Health programs target any of the determinants of health. They can focus on some aspect of the physical environments in which people live and work, on human behavior, on biology, on the social factors that affect people, or on the health services offered to them. There is therefore a broad array of health programs. For example, at the prevention end of the health services spectrum, people receive information about safe sex practices or how to eat healthier in the context of health education programs. At the advanced acute care end of the spectrum of services, people receive kidney transplants within the context of transplant programs.

A persistent, decades-long trend has created ever larger and more elaborate structures that organize, deliver, and finance health services throughout the industrialized world. Current manifestations of this phenomenon can be seen in major public health agencies, such as the California Department of Public Health (www.cdph.ca.gov), or large health services organizations, such as the Massachusetts General Hospital (www.massgeneral.org). Within these large and complex structures, however, health services are

provided directly through relatively small units called programs.

A substantial literature exists pertaining to the management of large and complex public- and private-sector health agencies, organizations, and systems. I have contributed to this literature myself. Nevertheless, there is a relative paucity of literature about managing at the level of health programs, where so much of the direct delivery of health services occurs. With this book, I seek to partially address this imbalance.

The intended audience for this book includes students in public health, in health services management, and in a wide variety of health professions who want to prepare themselves for the challenges of managing health programs. Even those who aspire to leadership positions in large agencies, organizations, and systems may begin their management career at the level of programs. The book will also be useful for those who already occupy a program management position, because it comprehensively and systematically presents current information about management.

Programs are defined in this book as organizational units intended to accomplish one or more objectives through a plan of action that describes what work is to be done, by whom, when, and how, as well as what resources will be used. Programs are embedded in organizations and should be of benefit to the larger host organization. Program management is defined as the activities through which the mission and objectives of a program are established and pursued by means of various processes using human and other resources.

As a way of organizing the discussion of program management, and to give a sense of the structure of the book itself, I present in [Chapter 1](#) a model of the activities

managers engage in as they manage programs. These activities are divided into two sets: core activities and facilitative activities. All health program managers engage in three core activities as they perform management work: developing/strategizing, designing, and leading. In addition, managers also engage in other activities that facilitate and support the accomplishment of a program's mission and objectives. Program managers engage extensively in such facilitative activities as decision making and communicating as they carry out their management work. Increasingly, they also engage in managing quality, marketing, and evaluating. Individual chapters of the book are devoted to each of these activities, presenting in-depth information about each of them. A brief précis of each chapter follows.

[Chapter 1](#), “The Work of Managers in Health Programs,” contains key definitions and a background discussion of programs and program management. The work of managers is considered in terms of the core activities in which all managers engage as they do management work: developing/strategizing, designing, and leading. Consideration of this work is extended to include managers' facilitative activities: decision making, communicating, managing quality, marketing, and evaluating. The entire set of core and facilitative activities in management work is modeled graphically in [Figure 1.4](#). This figure is the chapter's centerpiece, depicting the core and facilitative activities of management work as an integrated and interactive set of activities. There is also a discussion of the roles played by managers and the competencies necessary to manage health programs well.

[Chapter 2](#), “Developing/Strategizing the Future,” emphasizes the initial development and strategizing that bring programs into existence. Developing a program initially simply means conceptualizing the program as a

vehicle for delivering services or products that may succeed in the marketplace. In ongoing programs, development pertains to improving established services or products, or to expanding a program's portfolio of services or products. Development triggers strategizing, which is the work that managers do as they establish or revise the specific mission and objectives of a program and plan the means of achieving them.

[Chapter 3](#), "Designing for Effectiveness," is built around discussion of the work managers do when establishing and changing the intentional patterns of relationships among human and other resources within a program, and when establishing and changing the program's relationship to its external environment, including to the larger organizational home in which it is embedded. Attention is also given to designing logic models for programs.

[Chapter 4](#), "Leading to Accomplish Desired Results," describes leading as the work managers do when influencing other participants to contribute to the performance of a program. Emphasis is given to the fact that leading requires managers to help participants be motivated to contribute to programs in positive ways. Attention is given to specific leader behaviors that can improve management in programs.

[Chapter 5](#), "Making Good Management Decisions," emphasizes that decision making permeates all management work. The discussion of decision making represents a turn from core management activities to facilitative activities. Decisions are divided into two subsets: problem-solving decisions and opportunistic decisions. Problem-solving decisions are made to solve existing or anticipated problems. Opportunistic decisions are typically sporadic and arise with opportunities to reshape or advance accomplishment of a program's mission

and objectives. Although decision making is defined simply as making a choice from among alternatives, the decision-making process is discussed in terms of seven steps: (1) becoming aware that a decision must be made, whether it stems from a problem or an opportunity; (2) defining in as much detail as possible the problem or opportunity; (3) developing relevant alternatives; (4) assessing the alternatives; (5) choosing from among the alternatives; (6) implementing the decision; and (7) evaluating the decision, and making necessary follow-up decisions.

[Chapter 6](#), “Communicating for Understanding,” stresses that communicating activities are also ubiquitous in facilitating a manager's performance of all other management activities. Communicating is discussed as being both vital to the successful performance of management work and a challenge for managers. It is described as an activity that involves senders (individuals, groups, or organizations) conveying ideas, intentions, and information to receivers (also individuals, groups, or organizations). Communication is effective when receivers understand ideas, intentions, or information as senders intend, but several environmental and interpersonal barriers must be overcome to communicate effectively. The communicating activity is discussed as a key to managing relationships with a program's internal and external stakeholders.

[Chapter 7](#), “Managing Quality—Totally,” discusses why managers of health programs typically make effectively managing the quality of the services provided a high priority. Quality is important not only to those who use the services of a program, having an important impact on their service-seeking decisions, but also to people who work in programs. This chapter stresses that above all else, managing quality in a health program requires a systematic approach. Three components of what is called a total

quality approach to managing quality in health programs are presented: patient/customer focus, continuous improvement, and teamwork.

[Chapter 8](#), “Commercial and Social Marketing,” discusses two important ways managers of health programs can use marketing to facilitate program performance. The financial or commercial success of many programs is affected by the use of commercial marketing. In addition, especially in programs focused on health promotion and education, social marketing is used in the provision of services. The classic four Ps of successful commercial marketing strategies are discussed: **p**roduct or service, **p**rice, **p**lace, and **p**romotion, with attention given to an increasingly important fifth P, **p**eople. Social marketing is discussed in terms of using some elements of commercial marketing to influence the voluntary behavior of individuals and groups for their own benefit, and in some instances for the larger society's benefit.

[Chapter 9](#), “Evaluating,” discusses health program managers' evaluating activities in terms of collecting and analyzing data and information about a program or some aspect of a program as a basis for making decisions about the program. Managers' reasons for engaging in evaluating activities are discussed, including the following: (1) improving the overall performance of programs, (2) demonstrating accountability to stakeholders and justifying the use of resources, (3) demonstrating the effectiveness of programs in terms of accomplishing missions and objectives, and (4) demonstrating the effectiveness of specific interventions undertaken by programs.

Although it is convenient for purposes of discussion and description to separate into individual chapters the core and facilitative activities that constitute management work, the danger in doing so is that it may incorrectly depict

management as a series of separate activities, perhaps performed in a particular sequence. In practice, health program managers engage in these activities in a way that results in an interdependent mosaic. When managers integrate and perform this set of activities well, they are more likely to be satisfied with the performance of their programs and the results achieved. To the extent that reading this book contributes to this occurrence, I will have achieved my purpose in writing it.

An instructor's supplement is available at www.wiley.com/go/longest2e. Additional materials, such as videos, podcasts, and readings, can be found at www.josseybasspublichealth.com. Comments about this book are invited and can be sent to publichealth@wiley.com.

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The Author

Beaufort B. Longest, Jr., is a professor of health policy and management in the Graduate School of Public Health at the University of Pittsburgh. He is the founding director of Pitt's Health Policy Institute, which he led from 1980 to 2011.

Professor Longest is a fellow of the American College of Healthcare Executives and a member of the Academy of Management, AcademyHealth, and the American Public Health Association. With a doctorate from Georgia State University, he served on the faculty of Northwestern University's Kellogg School of Management before joining the Pitt faculty in 1980. He is an elected member of Beta Gamma Sigma, the international honor society in business, and of the Delta Omega Honor Society in Public Health.

His research on modeling managerial competence, issues of governance in health services organizations, and health policymaking has appeared in numerous peer-reviewed journals, and he is author or coauthor of eleven books and thirty-two chapters in other books. His book *Health Policymaking in the United States*, soon to be published in its sixth edition, is among the most widely used textbooks in health policy and management graduate programs. His book *Managing Health Services Organizations and Systems*, coauthored with Kurt Darr, is now in its sixth edition.

He has consulted for health services organizations and systems, universities, associations, and government agencies on health policy and management issues, and he has served on several editorial and organization boards.

Chapter 1

The Work of Managers in Health Programs

Learning Objectives

After reading this chapter, you should be able to:

- Define health, health programs, and management
- Understand the core and facilitative activities of managers' work
- Understand the roles managers play as they do management work
- Appreciate the underlying competencies demonstrated by managers in doing management work
- Understand the importance of applying well-developed personal ethical standards in doing management work

Much of the pursuit of health occurs through a variety of health programs. For example, when a young adult with type 2 diabetes leads an active and productive life, her health improvements may well be attributed to a program that helps her understand the disease and take an active role in controlling it. When the federal Center for Medicare and Medicaid Innovation established the Innovation Advisors Program, supporting individuals who test and refine new models to drive health delivery system reform,

improvements in the delivery system were made more likely (Centers for Medicare and Medicaid Services 2014). When a county health department mounts a project to enroll children in an innovative insurance plan, the impact on those children may be felt throughout a lifetime of better health.

One of the distinguishing characteristics of successful programs is how well their managers perform. This book is about the work program managers do. This chapter provides an overview of management work in health programs, as well as some key definitions and concepts, all of which serve as a framework for navigating the remainder of the book. Management work is described in terms of a set of core activities managers undertake in performing their work—developing/strategizing, designing, and leading—and a set of facilitative activities that also are important to management work—communicating, decision making, managing quality, marketing, and evaluating.

As a backdrop for considering management work, it is important to know that three distinct types of work occur in health programs (Charns and Gittel 2006). Direct work entails the actual provision of services or creation of products by participants in a program. This type of work is done by counselors, nurses, therapists, physicians, health educators, and others who form what Mintzberg (1992) classically termed the “operating core” of a program.

A second type of work done in health programs is support work. This work is a necessary adjuvant to the direct work. In health programs, participants performing support work are involved in such activities as fund-raising and development; recruiting patients for a clinical trial; providing legal counsel; or providing marketing, public relations accounting, or financial services for a program.

The third type of work done in health programs is management work. This work involves establishing—often with the direct involvement of others—the mission and objectives a program is intended to achieve, and creating the circumstances through which the direct work, aided by support work, can lead to the accomplishment of that mission and fulfillment of objectives.

An example will clarify the different types of work. A manager may establish one of the objectives of a program as enrolling one thousand children in an innovative insurance plan. The establishment of this objective is management work, as is the training of program participants to help parents or guardians enroll children. The act of enrolling children in the plan is some of the direct work of the program. The manager may also arrange for publicity surrounding the plan to increase awareness and encourage enrollment. The provision of publicity is support work, although arranging for the publicity is management work.

As we will see in this chapter, one useful way to assess and study management work is in terms of the activities managers engage in as they do this work. Often in the management literature the term *functions* is used instead of *activities* (Daft 2014; Marquis and Huston 2012). I will generally use the term activities, although the two words are interchangeable in this context. I will also discuss the roles that managers play in performing their work, as well as the competencies needed to do management work well.

Key Definitions

Before considering management work in more depth, it is useful to establish several key definitions to describe health and health determinants, health programs, and program management.

Health and Health Determinants

The World Health Organization (www.who.int/en/) has provided a long-standing definition of *health* as the “state of complete physical, mental, and social well-being, and not merely the absence of disease or infirmity” (World Health Organization 1948, 100). The state of health in human beings is a function of *health determinants*, which are a “range of personal, social, economic, and environmental factors that influence health” at both the individual level and the population level (U.S. Department of Health and Human Services 2014). The wide variety of determinants means that health programs have an enormous range of possible foci.

Health determinants for individuals or populations include the physical environments in which people live and work; their behaviors; and their biology (genetic makeup, family history, and physical and mental health problems acquired during life). Health determinants also include a host of social factors, which include economic circumstances; one's socioeconomic position in society; income distribution; discrimination based on race or ethnicity, gender, sexual orientation, or some other characteristic; as well as the availability of social networks and social support. Finally, the health services to which people have access also are health determinants (U.S. Department of Health and Human Services 2014). Health programs can be focused on any of these determinants, as well as on combinations of them.

Health Programs

A **program** is generally defined as an organizational unit intended to accomplish one or more objectives through a plan of action that describes what work is to be done, by whom, when, and how, as well as what resources will be