

Management, leadership and public health planning



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0. Introduction

The complexity and dynamism of healthcare systems around the world make them require strong, knowledgeable and skilful managers and leaders. The need for effective health managers and leaders is of paramount importance in allowing organisations and professionals to achieve their goals.

Part of the knowledge and skills that healthcare services managers and leaders should have include planning and change management.

In this essay, we will discuss, using a health project and examples, the steps undertaken in planning process and later on we will be discussing on various ways that healthcare services managers and leaders would partake to effect organisational change.

1. The steps in a health planning process

According to Ardal et al (2006), a plan is defined as “ a map, as a preparation, as an arrangement”. Planning defines the direction where the organisation or a person is heading and how to reach there.

Various activities are undertaken in health planning process. It is stated that health planning process follows as the same basic steps as any planning process and these steps form a cycle which is normally repeated in the planning process for programs, populations, systems or health goals. The necessity of repeated cycle is due to the prevailing conditions which some or all may push to the change of the existing plan. For example, new evidences

to create, restore or support health are released unceasingly, thus to incorporate these evidences into plans, the planning process should be cyclical (Ardal & al, 2006).

According to Ardal et al (2006), most planning cycles comprise seven steps which are:

- Surveying the environment
- Setting directions
- Identify problems and challenges
- Identify ranges of solutions to the problem and challenges
- Identify the preferred solutions
- Implementation
- Evaluation

According to the same source, some people might argue that planners are only involved in the first five steps yet planners are also instrumental in understanding and supporting to shape the implementation plan and evaluation. They may be invited to provide support in these latter activities.

To discuss on these steps, we use an example of a community health project on fighting against malaria in a local district.

1. 1. Surveying the environment

This step is concerned with the information collection to determine the current situation regarding the issue under consideration. The assessment of the current situation is done from various perspectives. For example, in the planning process for the project to fight against malaria, those involved in

the planning process can review the previous plans about the project.

According to Chatora and Tumusiime (2004), the review of the previous plans is essential in the planning process as it helps find out whether the government policy changed over a period of time and what its impact on the plan. Additionally, the planners can review the previous plans to see any change on certain key information in the planning like demographic information on the number of the target population, social, economic and cultural factors, community engagement in the process and health delivery. Similarly, the review of the previous plans provides information on the change about resources like human, financial and material resources and about the performance of the previous plans.

1. 2. Setting directions

This step involves goals and objectives setting and the establishment of the standards against which the existing health/ illness status or existing organisational or system performance will be compared with. Simply put, at this stage, health planners seek to answer the key question “ where do we want to go?” or “ what do we want to achieve”. In other words, the health planners identify the desirable future state or outcome for the issue in question.

For example, during the planning process of the project intended to fight against malaria in the district, those involved may set the target of having zero death due to malaria in the district during a certain period.

1. 3. Identification of problems and challenges

This step is concerned with the identification and quantification of the shortfalls between the existing situation and the desirable situation. To identify problems and challenges, the available data should be taken into consideration; data from health information management system, community surveys, census, reports, and anecdotes alike.

Problems can be either primary or secondary. On one hand, Primary problems include illnesses identified in the community like malaria, tuberculosis HIV infection, leprosy or other related to socioeconomic factors like inequity, unfairness or patient dissatisfaction. On the other hand, secondary problems or contributory problems are those problems related to poor health systems like shortage of health resources, poor health delivery services and poor management skills which contribute to the primary problems (Chatora & Tumusiime, 2004).

For example, during the process of planning the project to fight against malaria, planners have to make use of various data sources to determine the causes of the deficit between the current situation and the desired situation about malaria in their district

1. 4. Identification of range of solutions to problems and challenges

At this stage, a range of solutions to each identified problem and challenge is identified. Also, at this stage, an assessment of each possible solution, using criteria like feasibility with the available resources, cost-effectiveness, is done so that each solution can be compared with each other to ease the process of prioritisation.

For example, in planning process about community health project to fight against malaria, each identified problem and challenge that impede the initiatives to fight malaria a solution should be sought to it.

However, given the complexity of this step in identifying solutions to the problems and challenges, creativity is of paramount importance as some problems and challenges may not have readily available solutions (Ardal & al, 2006).

1. 5. Identification of preferred solutions

This step is concerned with the selection of a solution or a range of solutions to deal with the identified problems and challenges in the above step. The selection of the solutions may require to take into consideration fiscal and political context and other limiting factors (Ardal & al, 2006).

For example, in choosing solutions to the problems and challenges to the fight against malaria, government policies and guidelines and the available resources and other limiting factors should be not be ignored.

1. 6. Implementation

This step deals with the implementation of the selected solutions and it is preceded by the development of implementation plan.

1. 7. Evaluation

It stated that this step may start with the development of an evaluation plan well prior to the actual evaluation. This step is concerned with the evaluation

of the outcomes of the implemented solutions to determine if the latter resulted in achieving the goals set in the planning process. It is also concerned with the evaluation of the environment in which the plan was carried out to determine if any change occurred hence helping depict whether the implemented solutions were less effective, more effective or irrelevant. Additionally, it involves developing ongoing tracking system methods to be used to continuously make identification and assessment of the planned or unplanned outcomes of the implemented actions (Ardal & al, 2006).

2. Various ways to effect organisational change

Healthcare organisations, like any other organisations, either public or private constantly undergo changes. The need for change or reform in these organisations is reported to be fundamental to the management process. Managers of these organisations need to adapt how they work when faced with contextual changes such as the emerging new technologies, changes in environmental pressures, demographics, political ideologies, socioeconomic context and rising demand and cost (Goodwin et al, 2006). So, organisations have to change as their internal and external environment constantly change.

Numerous models and theories of change management have been proposed in the literature. These models include the 7-S model, PESTELI, soft systems methodology, Kurt Lewin's classic three-phase model of change-unfreeze, move or change and unfreeze, John Kotter's popular 8 step change model, etc. (Goodwin et al, 2006; The State of Queensland, 2014). It is stated that

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each model has its own advantages and disadvantages and no one approach is best in all circumstances. “ Indeed it is not so much the actual model or theory that is important, but more that the approach that is taken is relevant to the circumstances” (The state of Queensland, 2014). In essence, the best change model appear to make use of and adjust aspects of various models to meet the culture of the organisation in question and the context of change needed. Basically, it is reported that the goal of all change management is to secure the involvement of each and every one to the change and align individual and team behaviour and skills with the change (The state of Queensland, 2014):

For the case of the director of the Directorate of Public Health who needs to replenish the image of the organisation after observing that it was getting negative, below are the proposed ways that can be partaken to effect the health organisational change. They are the analytical tools that they can be used to develop a coherent strategic response to the situation like the one mentioned above.

- The 7S model
- PESTELI
- Soft systems methodology
- Process modelling
- SWOT analysis

2. 1. The 7S model

The 7S model is one of the diagnostic tools that healthcare organisation managers can use to conduct situational analysis to assess the gap between

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what is and what ought to be and it is often a tool that can be used for the justification for change management programmes. This model suggests that there are seven criteria which require the harmonisation of each other.

These criteria are the following:

- Strategy: this criteria is concerned with the plan or course of action that leads to the allocation of organisation's resources to achieve its goals.
- Structure: This involves the outstanding characteristics of the organisational chart. This is related to the organisational leadership structure and how its parts are interconnected inside the organisation.
- Systems: This criterion is concerned with the processes and procedures and the information flow around the organisation.
- Staff: This criterion is concerned with the categories of human resources within the organisation.
- Style: This is related to leadership style that the managers use to reach the organisation's goals.
- Shared values: This is concerned with the guiding principles that the organisation instil to its members.
- Skills: This is related to the staff capacity of the organisation.

Goodwin et al (2006) state that the 7S model can be used in two ways: in identifying strengths and weaknesses by taking into consideration the linkage between each criteria and how change made in one criterion will impact on all of the others.

Despite its attractiveness of its dual emphasis on soft and hard organisational components, it is criticised of providing one-sided organisational culture with the only sole focus on the similarities that stick to the organisation and ignore other important aspects like conflict and disagreement (Goodwin et al, 2006).

2. 2. PESTELI

PESTELI is described as checklist used to analyse the environment in which the organisation operates. It stands for:

- P: Political factors: political impetus and influences that have an effect on organisational performance or other options open to the organisation.
- E: Economic influences: competitive nature that the organisation faces and the financial resources available within the economy.
- S: Social trends: change in demographics, trends in the behaviour and attitude of people regarding how they live, work and think.
- T: Technological innovations: new ways of doing new and old things and mitigating new or old problems; be it equipment or new ways thinking or organising.
- E: Ecological factors: this involves defining wider ecological system to which the organisation belongs and the manner the latter interacts with.
- L: Legislative requirement: these extend from the employment law to environmental regulations.

- I: Industry analysis: this is concerned with reviewing of the rousing quality of the industry to which the organisation belongs.

As the 7S model, PESTELI can be used to conduct an analysis of the favouring factors in the environment in which the organisation operates and those that hinder the progress (Goodwin et al, 2006).

2. 3. Soft systems methodology

It is a tool which helps in articulating complex social processes. This is done by bringing together concerned people so that they can express their points of view, challenge them and test them. The following steps are undertaken when using this tool:

- Identify a problem and its causes from the stakeholders, cultural and political perspectives, without any attempt to impose a preconceived structure or to over-simplify the processes in place.
- Articulate root definitions of relevant systems: purpose, dynamics, inputs and outputs.
- Discuss on the situation with the stakeholders by describing the needed activities to achieve the root definitions using for instance process mapping tool or cause-and-effect diagram.
- Compare models with reality by observing, discussing and defining what to alter on the structure, process and attitude.
- Take action to implement the proposed solutions.

Despite the importance of this tool in making change happening, it was criticised of being time consuming and costly. Also, there are concerns of

whether organisational members are enough motivated to undertake the task to its end (Iles and Sutherland, 2001 cited in Goodwin et al, 2006).

2. 4. Process modelling

Process modelling is used as an approach to capture and clarify different views and expectations of a process. It helps increase the understanding of the situation at hand and how the proposed new one will make a difference. Simply put, the aim of this tool is to capture the dynamics of a situation so that those involved can brainstorm and come up with the best practices to change the current process.

2. 5. SWOT analysis

SWOT analysis is another important tool used to examine an organization's internal strengths and weaknesses, its opportunities for growth and improvement, and the threats the external environment presents to its survival (Harrison, 2010). It is a systematic way of examining why an organization needs to change. SWOT stands for: Strengths, Weaknesses, Opportunities, and Threats.

This tool can be used in combination with other tool. For example, it is used together with the 7S model to identify organisational internal factors and PESTELI to identify external factors that hinder the growth or the normal functioning of the organisation.

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