

Milestones

Overview of each subject

- Role of the Enterprise Manager
- Managing Service Delivery
- Managing Service Quality
- Making Information Work for You
- Organisational Structure and information Flow

Role of the Enterprise Manager

Introduction

In this Milestone we look at the changing role of the manager and explore some of the ways in which a better understanding of this role can help you to plan and manage more effectively.

Throughout this Milestone, the terms 'enterprise' and 'enterprise manager' are frequently used. They cover a range of areas and levels of responsibility within health and social care organisations.

By enterprise we mean:

That part of an organisation or work unit for which you as a manager have direct responsibility or to which you can most sensibly relate.

Different enterprises will vary considerably in terms of size and the extent to which they are entirely separate and free-standing. Some will be best defined by the physical area they occupy (such as a hospital ward or a home for older people) and the services carried on within them. Others will consist of a specialist service that is shared by many users in different locations (such as physiotherapy or home-care services) or of a mixture of physical resources and service provision (such as laboratory services or a day-care centre).

What is important is to define the enterprise for which you have responsibility.

This milestone is divided into six sessions:

Session 1: Forces for change – focuses on the idea of organising and managing in an enterprise so as to deal most effectively with the opportunities and constraints that influence it. We examine some circumstances in which you may be required to plan, introduce and manage change within your enterprise.

Session 2: Analysing your planning environment – introduces the idea of an organisation as a system of interrelated parts. We explore the way in which models based on the 'open systems' approach can help you understand your organisation and provide new insights into your planning environment.

Session 3: Managing in a flexible organisation – looks at changes in structure that tend to be made as a response to turbulent conditions in an attempt to operate flexibly and effectively. We consider the consequent demands placed upon both managers and staff for a new range of skills and approaches.

Session 4: Building up resource slack – considers the resource base you will need to build up in order to be able to plan and manage proactively. We introduce the idea of 'resource slack' and describe your strategic role as an 'investment manager' in developing resource capacity.

Session 5: The basis of power and influence as a manager – looks at the basis of managerial power and the particular sources from which you derive your own power to manage the process of adaptation and change.

Session 6: Key tasks for change – introduces a framework of key managerial tasks that will help you to evaluate the effectiveness of your own approach to managing and to start a planning process by which you may enhance your capability as an effective manager of planned change.

Specific learning outcomes for the milestone

The specific learning outcomes for this milestone are that, on completion, you will be able to:

1. critically evaluate the changing nature of the business environment as it affects your own enterprise and your particular management role in it
2. apply the notion of planned change in the critical assessment of the managerial changes you experience
3. apply a number of environmental models in order to analyse and map the complexity and interconnectedness of your organisational environment
4. identify, reflect upon and evaluate alternative views of the management process and their appropriateness in different circumstances
5. understand the various sources of managerial power and influence, and assess their appropriateness in supporting alternative management styles and strategies
6. diagnose problems and issues and apply management models to your own situation.

In addition, your work during the milestone will contribute to a number of the more general learning outcomes for the milestone programme as a whole, including the ability to:

1. undertake problem-solving approaches to a range of complex management issues
2. diagnose and evaluate complex situations and apply relevant models to organisational problems
3. select and critically evaluate current research, databases and academic sources
4. facilitate organisational change and development.

Managing Service Delivery

Introduction

This Milestone is written from the perspective of middle and senior managers, whose role is frequently not only managing the delivery of a service, but may also involve analysing needs in the community, commissioning, inspecting or managing a group of services, co-operating with a range of different professions, agencies and stakeholders, and taking a wider view of the place of the service in the community.

Session 1 starts with identifying some of the key political drivers that shape both the work of service managers in health and social care, but also shapes the expectations people bring to the service. A number of specific issues arising from the policy context are then explored, particularly measuring outputs and outcomes, concepts of efficiency and effectiveness, the nature of management control, and the importance of obtaining feedback from service users.

Session 2 looks at one of the key tools of service management: process design and improvement. This technique provides a model for improving the efficiency and effectiveness of service delivery systems, and a number of specific techniques for increasing capacity and efficiency are looked at.

Session 3 looks at issues relating to managing process across management and organisational boundaries, and also looks at the need to specify services to aid joint working, as a necessary component in commissioning services, and to provide a framework for expectations for and feedback from patients and service users.

Learning outcomes

General

Through the learning gained from the successful completion of this milestone, learners will be able to contribute to good management practice within their organisations by being able to:

- undertake problem-solving approaches to a range of complex management issues
- diagnose and evaluate complex situations and apply relevant models to organisational problems
- select and critically evaluate current research, databases and academic sources
- facilitate organisational change and development.

Successful completion of the milestone will also contribute to learners' management skills development by improving their ability to:

- reflect critically on and evaluate their own learning processes
- work independently to identify and anticipate problem areas and to investigate possible outcomes
- take responsibility for initiating, identifying and achieving desired outcomes
- critically evaluate material and information
- adopt increasingly creative and innovative approaches to management issues.#

Specific

On completion of this milestone, you will be able to:

- describe and analyse the impact of specific policies, performance measures and service standards that are relevant to your service area
- critically evaluate the efficiency, effectiveness and value base of your work
- set up systems to review the efficiency, quality and equality of services in a changing environment
- develop your role in relation to health and social care processes and cross-boundary working.

Managing Service Quality

Introduction

Quality is high on the agenda for health and social care – as in the public sector generally – and managers are under constant pressure from all stakeholders to improve the quality of their services. Patients' and service users' experiences, good or bad, can remain with them for the rest of their lives. An important part of the role of managers of health and social care is, therefore, to improve the quality of those experiences.

This book is divided into three study sessions:

Session 1: What is quality? – examines the meaning of quality and the relationships between quality and equity, and quality and cost. It introduces a model that can be used to analyse and improve service quality.

Session 2: Setting and measuring quality standards – discusses the development and monitoring of service standards.

Session 3: Quality management – explores the core concepts of quality management and discusses clinical governance and the Excellence Model as approaches to systematic quality management.

Learning outcomes

General

- Define quality in the context of the health and social care agenda and examine the relationship between quality and equity and cost.
- Explore, through modelling, techniques for the analysis and improvement of service quality.
- Examine the process of developing, monitoring and evaluating quality standards.
- Explore the core concepts of quality management.
- Analyse clinical governance and the Excellence Model as approaches to systematic quality management.

Specific

On completion of this milestone, you will be able to:

- define quality and describe its significance for health and social care in general and in your area of activity, in particular in the context of quality, equity and cost
- apply Parasuraman's gap analysis model to identify root causes of poor quality services
- develop service standards for your area of activity and identify processes for monitoring and evaluating service quality
- describe core concepts for the successful implementation of quality management and the principles of clinical governance and/or the Excellence Model to carry out a self-assessment of your area of work.

Making Information Work for You

Introduction

In this milestone we explore in depth aspects of the fundamental processes of information management: gathering, analysing, decision making, developing strategies and the introduction of information systems in the workplace. For gathering, the emphasis is on how to find sources of reliable information. For analysing, we focus on ways of extracting meaningful information from raw data. For decision making, we focus on the organisation of information and presentation issues. Then we focus on strategies and how the corporate strategies impact on your service. Then, finally, we look at the implementation of new information strategies and systems.

The milestone is divided into five study sessions.

Session 1: Developing good sources of information ... emphasises that using appropriate sources is fundamental to obtaining good quality information. We consider the three main sources of information – people, written material and the more recent electronic sources, such as the Internet and intranets. We also consider how to undertake research to answer questions that are not addressed by information from existing sources.

Session 2: Organising information ... focuses on the use of databases – including relational databases – as a means of storing data so that they can be readily accessed when needed. Databases are, however, more than merely an efficient means of storing data: they are also powerful aids to analysing data.

Session 3: Finding meaning in data ... examines a common problem facing managers of health and social care: there are plenty of data available, but what do they all mean? We discuss a number of techniques for using data from the past and present to make predictions about the future, as well as to aid decision making now.

Session 4: From corporate to local strategy ... begins with the recognition that information is a corporate asset and that many health and social care organisations have developed corporate strategies for information management. In recent years, however, in both health and social care, the aim has become to develop information strategies based on a national information technology infrastructure, with appropriate local implementation.

Session 5: Implementation and beyond ... examines the management issues that arise when new information systems are introduced into the workplace. Established working practices, organisational boundaries, power structures and so on can all be disturbed, and if these are not effectively managed the success of a new system can be undermined all too easily. Appropriate training is vital, and health and safety issues associated with computer technology also need to be addressed.

Learning outcomes

General outcomes

- Highlight the importance of developing an organisational strategy for reviewing and planning the use of information sources.
- Explore the use of databases for storing, organising and transferring data.
- Introduce data analysis for the purpose of planning, forecasting and decision making.
- Explore key issues arising from the implementation of the national information strategies for health and social care.

- Look at the implementation of a new information system at a local level from both a technical and a training and support perspective.

Specific outcomes

On completion of this milestone you will be able to:

- explain the need for an information strategy, and review and plan your use of human, textual and electronic sources of information
- describe and use different features and facilities of databases and their usefulness when preparing management information
- employ numerical analysis for turning data into information
- analyse the national information strategies in relation to your own area of work
- develop a strategy for implementing a new information system in your place of work.

Organisational Structure and Information Flow

Introduction

In this Milestone we focus on one of the key determinants of whether, and how, information is circulated into, out of and around an organisation; that is, the structure – both formal and informal – of that organisation.

Session 1 begins by defining 'structure', which has three components – formal relationships, informal relationships and conventions. Underlying problems with one or more of these components of structure are often masked or hidden by more obvious issues about personality and management style. We describe how, as organisations grow larger, the ways in which these three components manifest themselves change and increase in complexity. We also consider the issues and problems that organisational structures need to address so that managers and staff can operate as effectively as possible. We argue that, because of the complexity of the tasks of large health and social care organisations, many of the structural features are designed to reduce the uncertainty to which this complexity gives rise.

Session 2 examines alternative ways of structuring organisations so that their work is, on the one hand, divided up between groups of staff and, on the other hand, effectively co-ordinated to ensure that everyone is working towards the organisation's goals. We conclude by showing how some of the concepts that influence organisational structure on a large scale can equally be applied by the manager of a team or department, to seek solutions to structural problems in the area of work for which he or she is responsible.

Session 3 focuses on the core tasks that constitute the rationale for your section's or department's existence, as opposed to other tasks which, while they may also be important, support the main purpose of your work rather than delivering it. These core tasks may need to be carried out either sequentially or in parallel, and the requirements for co-ordination and information flow may differ accordingly. It also examines the areas in which you have opportunities to improve co-ordination and the flow of information in your area of work, such as the impact of the culture and climate that exist within your area of managerial responsibility, the extent of the 'fit' between the core tasks for which you are responsible, and the organisational structure within which you have to work.

Finally, we invite you to consider how your approach to managing needs to be adapted to meet the requirements of different types of work.

Learning outcomes

General

Through the learning gained from the successful completion of modules within the milestone programme, participants will be able to contribute to good management practice within their organisations by being able to:

- make clear and concise presentations of information that is relevant to the area being studied
- select and critically evaluate current research, databases and academic sources
- undertake problem-solving approaches to a range of complex management issues
- diagnose and evaluate complex situations and apply relevant models to organisational problems.

Successful completion of the milestone will also contribute to learners' management skills development by improving their ability to:

- reflect critically on and evaluate their own learning processes
- work independently to identify and anticipate problem areas and to investigate possible outcomes
- take responsibility for initiating, identifying and achieving desired outcomes
- critically evaluate material and information
- adopt increasingly creative and innovative approaches to management issues.

Specific

On completion of this milestone you will be able to:

- understand the language used in the analysis of structures and systems and recognise the impact of relationships on structures
- propose alternative solutions to structural and/or system problems
- appreciate individual resistance to change and uncertainty
- identify the core tasks that are the rationale for your area of work
- analyse how you can improve the co-ordination and the flow of information in your area of work through a consideration of:
 - the culture and climate in which you work
 - the extent of fit between the core tasks and the organisational structure
 - your management style.