

PUBLIC HEALTH SERVICES

Program Operations Manual Template

February 21, 2023



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The *Program Operations Manual Template* was developed under the *Public Health Services Strategic Plan*, in the County of San Diego Health and Human Services Agency, to advance the vision of *Live Well San Diego*. The Plan is also a requirement of national public health accreditation. Public Health Services department was accredited on May 17, 2016.

Revisions: November 9, 2022; February 21, 2023

PROGRAM OPERATION MANUAL

TEMPLATE WITH SAMPLE QUESTIONS FOR PROMPTS

Background: This document is aligned to the Baldrige Framework of Excellence and provides Public Health Leaders and Senior Staff a standard template to complete so each major program maintains institutional knowledge and enables knowledge transfer between program managers.

Instructions: Please use this standard template to create a program operation manual for all programs within your branch. This template is designed for you to fill in each of the headings below. To simplify the process, question prompts have been added in red italics. If the heading does not adequately describe what needs to go into any given section, use the question prompts to help provide ideas about what should be included in the section. If there is additional information you think is essential to include in that section, please include it.

PART I: INTRODUCTION

A. Program Name

B. Purpose

The purpose of this manual is to convey key *program operations* information to all staff that will be responsible for managing and implementing *program* activities.

Please note, a Manager's Manual is also available as a resource to Public Health Services (PHS) Program Managers that includes supplemental information relevant across all PHS programs (e.g., customer service, performance management, human resources, budget, and fiscal). The purpose of this manual is to describe the essential programmatic and operational information.

The purpose of _____ is to _____.

C. Manual Sunset Date and Ownership

Sunset date: This manual will be updated every 3 years, or as needed.

Lead: The Program lead is _____.

D. Program Roles and Responsibilities

Who is responsible for managing (include program and operations management), implementing, and evaluating this program? Provide a quick one paragraph description of the key people who roll out the program and what their function is relative to the rollout (e.g., processing invoices, developing, and submitting progress reports to the state).

E. Structure – Organizational Chart(s) for the Program

Please insert or create a simple organizational chart of the key program staff members and who reports to whom. This can include contractors and student interns, volunteers, and/or workers. Hyperlink to the organizational chart.

PART II: PLANNING

A. Leadership

1. Oversight

Who is ultimately responsible for this program and what is the chain of command?

B. Strategy

1. Strategic Planning

How is strategic planning incorporated into this program? How does the program feed into or draw from the broader branch strategic planning effort? What would a new program manager need to know about the strategic planning cycle and requirements in your branch?

2. Strategic Initiatives

What are the key strategic initiatives that this program manager should be aware of for integrating into their thinking and program efforts (e.g., health equity, climate and public health, trauma-informed)?

3. Disproportionality

How are issues of disparity and/or disproportionality taken into consideration and/or addressed through this program if applicable?

C. Customers

1. Internal and External Customers and/or Stakeholders

Who are the customers for this program? For example, are your customers internal or external? Who are the stakeholders?

2. Customer Service Input and/or Surveys

How do you collect customer service survey input? How often?

E-mail

QR Code

Paper survey

Signature block

3. Customer Service Training

Customer Service training is provided by The Knowledge Center (TKC), a support service of the County of San Diego (County) Health and Human Services Agency (HHSA).

Are there any recommendations regarding customer service training? Briefly describe your branch's customer service activities including participation on the PHS Customer Service H.E.A.R.T. Team, and use of the annual customer service survey to develop your branch impact plan.

PART III: GATHERING DATA

A. Measurement, Analysis and Knowledge Management

1. Measurement

What are the key metrics/indicators that measure success operationally, programmatically, or in terms of population health outcomes? Program metrics should include core measures that have been identified by the Strategic Plan, Health Equity goals, population indicators and/or Operational Plan objectives.

2. Analysis

What analysis is required throughout the year to ensure your program is on track?

PART IV: EXECUTION

A. Workforce

1. Roles and Responsibilities (including job descriptions)

What is the role of each person involved in the implementation of this program, including contractors? Who is responsible for what? How much of their time is dedicated to this program (e.g., 25%, 50%, 100%)? Attach one-page summaries or job descriptions here.

2. Workforce Development: Training and Education

PHS has a Workforce Development Plan. Every Program Manager should be aware of this document. Updated versions will be sent out to staff every 2 years. Otherwise, obtain a copy from the branch Chief. Trainings are identified for this 2-year period and included in the Plan.

There is an expectation that all PHS staff will have a working knowledge of County organizational competencies (e.g., knowledge worker, customer service). There is an expectation that PHS staffs are familiar with the [10 Essential Public Health Services](#), the [Core Competencies for Public Health Professionals](#), and the [Public Health Foundational Services](#). Lastly, staffs should have a working knowledge of program planning, project management, fiscal management, and public health sciences.

What trainings are essential and recommended for the program manager?

What trainings are essential and recommended for other staffs who work on this program?

What would a new program manager need to know about the core competencies or how they relate to their role?

3. Human Resources – Personnel

PHS has Departmental Human Resource Officers (DHRO), who are embedded in the department. The [InSite](#) page contains important information about County HR policy and procedures documents. The DHRO will provide guidance on the hiring and other HR processes.

What else can you think of that a new program manager would need to understand about HR and personnel?

B. Operations

1. Structure – Org Charts

It is important to understand the organizational structure of the County, HHSA, and PHS. In addition, the organizational structure of your program is important (see above section).

2. Program Overview (including History and Program Background)

Give a brief overview of the program. Include for example:

What is the history of the program? What year was the program established? Are there any mandates? Who are the federal and/or state partners? Who are the local community partners? Who are the contractors? Is this a Board of Supervisors, HHSA or PHS priority? Has the program expanded or diminished over time? What has been the primary scope and focus of the program? Does the same program exist in other local health departments? Other key historical or background information you believe a new manager would want to know?

3. System Overview

Describe how your County program efforts align with efforts of the local community (e.g., partners and sectors, educational institutions), regional, state, federal and national levels, as well as cross-border efforts. Provide a map or visual aid that would explain to the new program manager any essential system components and/or elements. If you think of your program as a system of moving parts, what are those moving parts? What does the system look like if you were to explain it and/or convey the system in a visual manner.

4. Process Overview (including Process Maps)

*At the more granular level, the system could be made up of a number of discrete processes. These could be administrative, technical, or clinical. Consider providing a **process map**, **protocol map**, and/or other visual aid(s) that would explain the program to new staff members. What are the key components of the program?*

5. Operational Planning

The County operates under the General Management System, which consists of 5 components one of which is “Operational Planning.” The Operational Plan is a rolling plan renewed every two years. A section of the Operational Plan is devoted to PHS and includes department description, current year accomplishments, next year objectives, a performance measure table with results over the past several years, and budget changes with operational impacts. The Operational Plan measures are reviewed by the Board of Supervisors every year in May. Presentations on the Operational Plan are made by each department in the four business groups. PHS leadership provides these annual presentations.

What is your operational planning cycle for this program? What would a new manager need to know about the operational planning for this program? How would you know if your program plans needed to be adjusted? What steps would you take to adjust if there are unexpected setbacks or factors that arise throughout the year? What are the expectations of each program manager to roll up their operational plans into the broader branch planning effort if any (e.g., budget, FTEs, equipment, other)?

6. Work Plans

All program managers, initiative leads, working groups, and staff of PHS are expected to maintain work plans. Work plans are a key tool to establish an understanding of strategies, goals, objectives, activities, and deadlines. Work plan content also serves to populate the performance review every year. PHS Admin can provide a sample work plan. All program managers and their staff should maintain evergreen work plans that identify what needs to be done by who and when and include a status column. Managers are expected to be meeting with direct reports and their teams regularly (e.g., monthly). The work plan then becomes a key discussion point for one-on-one meetings with the Director or between Program Managers or Supervisors and staff who will be responsible for the activities that make up the work plan.

7. Key Dates and Milestones

What are the key dates and milestones the new project manager needs to be aware of and/or put in their Outlook calendar? Are their key dates when grants are due? Are their regular programmatic or management meetings? Are their project related milestones? When are key reports, updates, or other internal or external deliverables due that the program manager needs to be aware of?

8. Reporting Relationships/Approvals

When the program manager needs approval (e.g., on a web page, brochure, or report going out to the public), who is required to sign off and what is that process starting with the program manager? Are there any policies and procedures about when to get the Chief to sign off on a document? What authority does the program manager have when approving the various aspects of the program (e.g., purchasing, contracts, contract amendments)? What does the program manager need to know about the reporting relationships and approvals? Who can the program manager reach out to if they are unsure or have any questions?

9. Administrative and Program Support

Who are the departmental subject matter experts or responsible parties that the new program manager should reach out to for administrative and/or program support that may be outside of the funded positions for this program or grant (e.g., PHS Admin Contracts and Budget Office). Are there others within your branch that help achieve program efforts that may not be funded by the grant but regularly help or can be reached out to (e.g., an administrative analyst or administrative support person for booking rooms or ordering supplies).

10. Meetings

What are all the key meetings the new program manager needs to add to their Outlook calendar? What are the regular meetings with stakeholders or partners or internally (e.g., senior staff, all staff)?

11. Site Operations

Are there any on site operational elements that need to be described or conveyed to a new program manager? Are their key policies and procedures that can be pointed to that guide the roll out on site of a program, provided it takes place on site such as clinical prevention programs. If the program is held off site and there is nothing to communicate then indicate NA. If the program site operations are described in other documents (e.g., SOW with a contractor, refer to these other documents).

12. IT & Databases

What are the key databases or software that the new program manager needs to upload to their computer or obtain access to? How do they go about getting access to these databases? Who do they have to talk to or request the access from? Where can they get trained on how to use these data bases or this software?

13. Suppliers and Inventory

Who is responsible for ordering supplies and keeping track of inventory related to this program? What would a new manager need to know about this process and its tracking? What is the responsibility of the program manager in this regard?

14. Legal Mandates

Does the County, the department or your branch have a legal mandate to deliver this program? If yes, reference it here. Where is it written that this program is to be delivered and by who or any additional key details and references. Consider including a link to where this is written.

15. Policies and Procedures

What are the key policies and procedures this program manager needs to know about to oversee this program and/or as a program manager in general in your branch? Where are these policies and procedures located (e.g., Policy Tech or a section thereof)? How does the new program manager get access to Policy Tech? Who do they need to contact for training and help with Policy Tech?

16. Funding, Budgets, Financial Management and Audits

What key information does the program manger need to know with respect to funding this program? Where does the funding come from? What is the grant cycle? What is the budget and where can it be found? How is the program monitored? What are the regular and periodic audits a new program manager should expect? What other key funding, budgetary or audit information would you want to pass onto a new manager overseeing this program?

17. Grants (including Application, Work Plans, Annual/Semi-Annual Reports)

Similar to the section above, please provide additional information specific to the grant of there is one associated with this program. For example:

Where does the application come from and when? Who develops the annual work plans and maintains them? Where can the latest work plan be found? What are the annual or semi-annual reports that are due to the funder? Are there other reports due to others in the administration of this program?

18. Contracts

What organizations does your branch contract with, if anyone, to rollout this program? Are these contracts on a cycle (e.g., 5 years)? Do they go out for bid (RFP) and if so, how often? Are they fixed price or other types of contracts? What key information would a new program manager need to know about overseeing the contracts for this grant? Who do they need to work with? Who can they reach out to for additional information?

19. Privacy

Are there any privacy laws that apply to the execution of this program? What are the privacy requirements (e.g., confidentiality of patient information)? If the new program manager has questions about the privacy laws or requirements, who could they reach out to?

20. Communications and Health Promotion (including web pages)

What are the key communication tools the program manager has to promote and/or describe the program (e.g., web page, brochure, fact sheet, one pager)? Where are all of these found? How often do they need to be updated or reviewed?

21. Knowledge Management

If there are any expected practices with respect to documenting, communicating, or tracking elements of the program, please describe those here. For example:

Are there any expectations of the program manager with respect to documenting aspects of the program that would enable successful transition in the future? Are there key documents that are to be saved and uploaded to the shared drive or a Share Point site that would document key elements of the program and could be referred to in the future? Are there any requirements or expectations that certain documents are maintained and easily accessible to others?

22. Infrastructure and Facilities

Does the program manager have any responsibilities for facilities or infrastructure on or off site in the execution of this program? If there were an incident at a facility, what are the program manager's roles and responsibilities for managing any elements of the site? Who would the program manager contact if they have any questions in this regard? Are there any key documents or committees that the program manager needs to be aware of and/or to review that relate to infrastructure and/or facilities? If not, put NA (not applicable).

C. Gathering Results

1. Quality Assurance & Quality Improvement

How is the quality assurance (QA) or quality improvement (QI) conducted for this program? What are the cycles? What are the requirements? How are QI projects identified in this program, and is there a link between QI and program performance? What would a new program manager need to know about the QA aspect of this program? Who can they reach out to if they have questions? Any other QA/QI information that would be key for a program manager to know? Do you have a representative on the Performance Improvement Management (PIM) Committee (which handles both performance management and quality improvement activities across PHS) and what is their role vis-a-vis the program?

2. Metrics and Action Plans

If not already described above, does this program have a set of indicators and/or metrics that guide its performance? Does this program have a strategic plan or an action plan with key goals and/or objectives? What would a new program manager need to know about the indicators for success and the strategies, goals, and objectives that guide this program? Is there currently an effort underway by your branch to establish key metrics/indicators and/or an action plan? What would you like to communicate to a new manager about this effort and/or its status?

3. Dashboards and Results

If not already described above, does this program maintain a set of indicators/metrics and where can they be found? Are these indicators/metrics maintained using an application (Clear Impact), a dashboard, or in some other way. Who is responsible for maintaining the measures or metrics? Is there anything you would want a new program manager to know about how results are captured and/or communicated? What are the expectations for communicating results and how often? Who could a

new manager reach out to if they had any questions about metrics/indicators and how well the program is performing? What actions, if any, are taken if performance is below target or expectations?

4. Reporting Results (e.g., State requirements for funding)

If not already described above, what are the expectations for reporting program results internally or externally? Does the grant funding agency have reporting cycles and what are they? Does the County expect reports and when? Where can one find last year's reports? Who do reports need to be submitted to and by when?

PART V: PARTNERSHIPS AND CONTACTS

A. Partners

If not already described above, are there any partners that help deliver this program (e.g., key contractors, community-based organizations, local universities, the State)?

B. Contacts

Who are the key contacts that the program manager will need to work with most closely (e.g., contractors, state, universities? What are their email addresses, titles and/or phone numbers)?

PART VI: REFERENCES

C. References

Are there any reference documents or similar resources the program manger should be aware of? Are there web sites associated with the program or grant?

D. Attachments

Are there any relevant attachments you want to include for the new program manager?

E. Technical Terms/Definitions

What are the key technical terms or definitions you think the program manger might need to know?

F. Acronyms

What are the commonly used acronyms in the administration of this program that would be helpful for the program manager to know?