

staff personnel often tries to go it alone, attempting to be all things in all situations, operating without the available staff assistance.

As far as functions are concerned, the difference between line and staff, as suggested earlier, is the essential difference between doing and supporting. As far as nonmanagerial employees are concerned, line personnel do and staff personnel support. But as far as managers are concerned, managers are all line managers in the operation of their own departments and in the direction of their own employees. Their functions may be clearly definable as staff functions—like accounting, public relations, and human resources—but as managers they are by definition line personnel when operating as managers within their own departmental chains of command.

Many healthcare institutions are organized along functional lines, giving rise to another way of grouping activities for organizational purposes. We often see healthcare organizations structured along a three-way division of functions: (1) medical (nursing, radiology, laboratory, and others); (2) nonmedical (food service, housekeeping maintenance, and others); and (3) financial (business office, payroll, general accounting).

### A Title as More Than a Label

This discussion has so far been about titles of managerial positions and the various uses of such titles to differentiate levels of responsibility, but we should also consider the use of titles as “status points” or as a form of “psychic income.” Not long ago most hospitals and nursing homes were run by top managers known as administrators. Now, however, we see many chief executive officers, executive directors, presidents, and similar titles; those top managers who are still titled as administrators are a vanishing breed. The functions and responsibilities of a position may have changed little if at all between the days of administrator and executive director, but the latter title may be more impressive to a larger number of people than the former title. It may sound marginally ridiculous, but differences in title do matter in terms of how some people see themselves and how other people view the positions of the title holders.

Title differences are significant only to the extent that they may affect your view of your position. Avoid falling victim to the attitude of the person who said, “I’m no manager—I’m just a supervisor.” As a supervisor you are, in fact, a manager, and it is important that you see yourself as a manager and clearly consider yourself to be a member of the collective body known as management.

### INTRODUCING THE BASIC MANAGEMENT FUNCTIONS

There are several kinds of activities that all managers pursue in fulfilling their responsibilities. For our purposes, we will break these into five groups, which we will refer to as the basic management functions: (1) planning, (2) organizing, (3) directing, (4) coordinating, and (5) controlling. This five-way breakdown is not original within this work; rather, it has served for years as a reasonable, if somewhat general, description of what managers do. In the management literature you may encounter other lists of functions that contain four, five, or even more entries and use labels different from those

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applied here. One different, widely utilized breakdown is found in the work of Theo Hamann, who refers to the basic management functions of planning, organizing, staffing, and controlling.<sup>1</sup> The same five-function breakdown appears in a number of other sources, including Charles Housley and Nancy Nichols writing in *The Health Care Supervisor*.<sup>2</sup> Still another more recent source, *Principles of Health Care Management* by Seth B. Goldsmith, describes a seven-function breakdown: planning, organizing, staffing, directing, controlling, coordinating, and representing.<sup>3</sup> The seventh, representing, described as the process of being a spokesperson for the department, organization, or industry on the outside, is not often encountered as a separately enumerated function.

An interesting four-function breakdown appears in a study guide published in 1985.<sup>4</sup> This division of the management functions at first seems to be only a partial listing of the functions already presented: planning, organizing, directing, and controlling. In this approach, however, directing is subdivided into two categories identified as directing: goals and directing, and motivation. Other delineations of the management functions to be found in the management literature include planning, organizing, leading, and controlling; planning, organizing, staffing, motivating, and other variations; and early management theorists, was basing much of his management approach on the simple four-function breakdown of planning, organizing, leading, and controlling.<sup>5</sup> It is important to appreciate that none of these lists of functions represents someone's belief that a particular listing is the absolutely correct delineation of management functions while the others are lacking. Certainly the various lists of management functions are more similar than dissimilar. As evident in the examples cited above, nearly all such lists specifically cite planning, organizing, and controlling, and all such lists begin with planning.

The differences among the lists are simply matters of semantics and matters of how one views some of the elements of management. What is directing in one approach may be leading in another; what is organizing and staffing in one approach may simply be organizing in another; what belongs under both coordinating and controlling in one approach (such as the one used in this chapter) may all be encompassed by controlling in another.

Why all of these differences? Are there not clearly definable management functions that can be kept separate? The truth is that we cannot clearly differentiate among a number of separately defined management functions in a manner that covers all circumstances. In speaking of management we are speaking of a broad pursuit made up of many overlapping and interwoven activities. The overall management process occurs along a continuum; the management process is cyclic. All of the business of "defining" management functions is simply a convenience that allows us to examine portions of the management cycle in a way that emphasizes certain kinds of activities. Regardless of the labels applied, however, it is the concepts that are important. It will be helpful to your understanding of management responsibilities to develop an appreciation of the kinds of activities managers pursue for certain purposes. Later in this chapter we will consider how the emphasis on certain of these basic functions differs according to your position or level in the management structure. Specifically, we will suggest that a manager's

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We are planning any time we look ahead at what we might be doing some time in the future. The "future" may be months or years ahead or it may be only minutes away. Whenever we try to look ahead and predetermine a possible action for a time that has not yet arrived, we are planning. Planning often involves policy-making, objective setting, and developing strategies for reaching the organization's objectives.

Planning can be high level and far reaching, as when executive management and the board of trustees of an institution develop a long-range plan calling for growth and expansion or other major changes. Much planning, however, as it concerns most working managers, is short term and oriented toward near-future applications.

As the development of a 5-year plan for a hospital is an example of planning, so the development of a department's 1-year budget is a representative planning task. Likewise, if you spend half a day developing the work schedule for

## PLANNING

*Controlling* is follow-up and correction, looking at what actually happened and making adjustments to encourage outcomes to conform to expected or required results. It is controlling that best illustrates the cyclic nature of management and the inseparability of the basic management functions. By its very nature, which is itself simply planning, since that activity is also a cyclic process.

*Coordinating* consists of integrating activities and balancing tasks so that appropriate actions take place within the proper physical and temporal relationships. Coordinating does not appear by name in a number of other definitions of the management functions, yet in all cases it is directly implied in descriptions of the tasks managers perform.

*Directing* is assigning specific resources or focusing certain efforts to accomplish specific tasks as required. Simply stated, directing is running an organizational unit on a day-to-day basis. Directing may be considered to include a great deal of leading, yet leading is woven throughout most of the other functions as well. Directing may also be considered to include motivating and implies in getting things done through the unit's employees, yet motivating is certainly a consideration throughout the other functions as well.

*Organizing* is the process of structuring the framework within which things get done and determining how best to commit available resources to serve the organization's purposes and carry out its plans. Organizing essentially includes what is often referred to as staffing in certain other discussions of the management functions.

*Planning* is the process of determining what should be done, why it should be done, where it should best be done, by whom it should be done, when it should be done, and how it should be done.

## MANAGEMENT FUNCTIONS IN BRIEF

organizational position has much to do in determining which management functions are likely to, and perhaps should, consume most of the manager's time and effort.

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We are all aware of what happens to "the best laid plans of mice and men." Since our plans, especially those that look more than a few days into the future, seem rarely to generate results exactly as planned, we might reasonably ask, "Why plan at all?"

In defense of planning, we cannot overstress the importance of having well-defined targets at which to aim. Granted we are often going to miss targets because conditions change between the time the plans are generated and the future arrives and because of weaknesses in the planning process itself. When we have a target, however, even when we miss it we have learned something; we at least know by how much we missed the mark and perhaps in what direction we were off, and with that information we can assess both our planning processes and our work practices.

Consider a simple analogy in shooting an arrow toward a target. If the target is simply a blank circle, this whole target is our mark, and as long as we strike anywhere in the circle we really do not know much about where we hit relative to where we wanted to hit. However, when we add a bull's-eye and several target rings, we then have a clearer idea of how much we need to adjust our shots to come closer to where we would like to be.

### The Plan Is Not the Objective

Although much supervisory planning need not be formal or time consuming, it nevertheless pays to be sufficiently thorough and organized to commit your plans to writing. Often the simple act of putting your thoughts on paper will serve to crystallize your ideas and help you decide on the essentials.

the habit of "overplanning." Indeed, some people spend so much time planning that they rarely have time to do anything.

job might involve, at this point we can suggest that you should keep your planning reasonable in terms of how much you do and how long it takes. Planning is essential to effective managerial performance, but it is possible to fall into

Although more will be said later about how much planning a supervisor's through the period to which it applies.

### An Imperfect Process

The imperfect nature of planning suggests that plans should be flexible, intended to be changed and updated as the time to which they apply comes closer. If you have done any personnel scheduling, for instance, perhaps you will appreciate the necessity to revise your schedule as you move into and through the period to which it applies.

minutes before the fact, does not always come to pass as envisioned. Generally, the further into the future we are projecting, the less accurate our planning is likely to be. It stands to reason that we never attain full knowledge of the future until the future becomes the present, so we are always looking ahead with less than perfect information.

We should recognize, of course, that the future, even when second-guessed to take care of in the morning, you are engaged in planning.

your department's employees for the coming month, you are actively involved in planning. Even if you simply pause at the end of the day to order your thoughts, sort out the notes on your desk, and jot down a list of items you need

Keep in mind, however, that when plans are not realized it could be for any and what was once a good plan is no longer valid in the light of new conditions. It is also possible that the plan was inadequate to begin with. Also, there is always the possibility that the plan was well conceived and fully adequate but failed to work because the implementation effort fell short of what was needed. In any case, whether or not our plans work out well we have always learned something from the experience. It has often been said that plans themselves are not particularly worthwhile, but that the planning process is invaluable. Indeed, what is truly valuable is the cyclic process of examining needs, setting objectives, making plans to reach those objectives, implementing the plans, and following up on the total effort.

Plans should never be regarded as cast in concrete. We sometimes tend to try bending reality to fit the plan so as to arrive at the results we projected. It is true that a certain amount of this kind of effort is called for with some kinds of plans. Departmental budgets, for instance, should be considered as relatively important targets to be met. However, a plan is first and foremost a guide to action—it is not in itself a predestined action.

As a first-line supervisor you may not feel there is a great deal of planning required of you. This may be generally true, but you will find that every management position, even one in the lowest levels of management, requires some planning. A certain amount of planning is necessary to help you run your job properly, and if you do not run your job to at least some extent there is a good chance that your job will run you.

## ORGANIZING

Sometimes it may seem that organizing, much like planning, is not a particular concern of the first-line supervisor. It is true that much organizing has to do with departmentalization, the process of grouping various activities into separate units to carry out the work of the organization. Much of this takes place at high levels in the organization and may not occur very often. However, as a first-line supervisor you engage in acts of organizing similar to departmentalization whenever you make decisions concerning which people within your department are going to handle certain tasks. Whenever you become involved in making decisions concerning division of labor or separation of skills, you are organizing.

### Unity of Command

One basic principle of organizing with which you should be familiar is unity of command. Unity of command requires you to provide assurance, for all the activities within your responsibility, that in all instances specific employees are responsible for certain specific results on a one-to-one basis. That is, it is inappropriate to assign task responsibilities in such a way that your employees have room for doubt concerning who is ultimately responsible for any given task. Likewise, unity of command suggests that no function within your responsibility should be allowed to “drift” without belonging to some specific person.

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