

Public Health Financial Management: Building on Survey Findings

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Survey recap

- Developed local and state surveys based on competencies
 - Financial managers indicated
 - Areas where additional training is most needed
 - Importance of specified areas to agency operation, and
 - Preferred delivery mode
- Major challenge: identifying lead finance officer/manager for local HDs—could be
 - Agency administrator
 - In another administrative sector
 - At the state public health agency

Agency sample and responses

- Sample size: 300
 - Survey fielded using Zoomerang
 - Two reminders at 2-week intervals
- Complete responses: 112
- Response rate: 37.3%
- States represented: 30

Summary of priorities by tier

- Tier 1:
 - Knowledge of budget activities
 - Financial data interpretation and communication
 - Ability to assess and correct organization's financial status
- Tier 2
 - Basic financial and business processes
 - Cost accounting, managerial accounting, grants accounting, and their applications

Summary of priorities by tier, cont'd

- Tier 3:
 - Negotiate, implement, and monitor contracts
 - Management evaluation methods
 - Federal regulatory compliance
 - Financial management systems and controls
 - Quality and risk controls
 - Identifying new revenue streams
 - Strategic planning

Respondent educational background

- Some college or associate degree : 11%
- BA, BS, other baccalaureate: 36%
- Graduate coursework: 15%
- MPH, MHA, MPA, MBA/ other graduate business degree: 30%
- MA, MS, MSN, other graduate degree: 10%
- PhD, Dr.PH, JD, other doctorate: 2%
- MD: 1%
- Other: 9%

Jurisdiction size

- 25,001 to 40,000: 31%
- 40,001 to 150,000: 46%
- 150,001 to 1,000,000: 23%

Respondent comments

1. Effect of agency structure and size

We are a centrally structured state Health department. We do not deal directly with any financing or accounting details to maintain the structure and integrity of the health department.

We are a health district so many of the financial functions are handled in our City financial department.

In smaller or medium sized health departments this function is many times handled by the Health Officer.

2. Training topics

Establish minimum public health services quality standards and provide training on subject.

Include cost benefit analysis course (comprehensive multifactorial analysis, opportunity cost) and instruments to prioritize policies (alternatives, long term/short term cost).

Include qualitative analysis and quality of life indicators.

Epidemiology and economic impact assessment (the economic consequences of intervention or lack of) as in the case of tobacco use, obesity or ecological challenges.

Respondent comments: format

We welcome any training opportunity that could enhance the efficiency of our fiscal services. Unfortunately, our resources for the cost of such training are fairly limited. I suspect that this is probably a common problem for smaller, rural local health departments.

Time is a big issue, with rural health departments the small number of personnel make taking time off to attend regular classes a problem. Short 1 day classes or online offerings would be better received.

I would really like to see trainings relating to management and evaluation methods that use performance measurement, financial and economic evaluations, and the ability to use them to monitor program performance and track achievement of program objectives. I think that would strengthen public health's ability to pursue funding by showing and presenting the outcomes.

We need to resolve the conflict between decreasing staff and increasing training requirements.

More respondent comments

It's important to provide training for non-financial people to understand.

A graduate level certification or specialty in this field would be very useful

Building dedicated trust accounts in which funds from fees, fines, reimbursements are not lost to general revenue account but can be used to keep programs sustainable.

At our agency I have just completed a two year accounting restructure, but the consistent awareness of many staff about how finances work is very bad, despite internal trainings and communication

Include elected officials in trainings.

This is a neglected area of training even in graduate-level programs.

I guess the correct response is [state name] but I would call it the state of Chaos!

In progress

- Complete key informant interviews on survey findings and implications
- Identify potential vehicles and sponsors for training
- Explore practice variation in relation to known variables in public finance associated with system design and ecological factors (cluster analysis)
- Relate findings to typology studies
- Identify alternatives within existing political context of local public health agencies

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