

CORE COMPETENCIES



QUICK GUIDE



NATIONAL ASSOCIATION OF
Community Health Centers®

Competencies

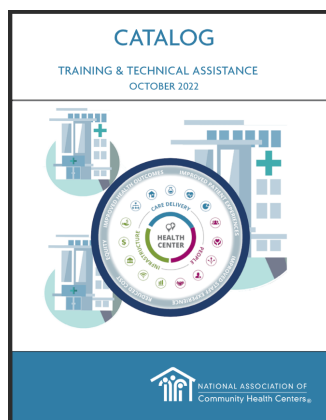
This quick guide to Competencies is designed for health center staff, leaders, and members of health center governing boards, as well as health center program stakeholders and those seeking to learn the nuances of the FQHC operating environment and model.

This document collects competencies developed by NACHC for Clinical Leaders, CEOs, and CFOs. Some competencies are general in nature, applicable to all, but some are specific to a particular job role. To learn more about the competencies established for each separate role, you can access the NACHC materials here:

- [Chief Executive Officer \(CEO\) Competencies Domains and Skills/Tasks: CEO Core Competencies](#)
- [Chief Financial Officer \(CFO\) Competencies and Professional Development Tool](#)
- [Clinical Leadership Core Competencies: Domains, Skills, Tasks](#)
- [Primary Care Association \(PCA\) Chief Executive Officer \(CEO\) Core Competencies](#)

NACHC utilizes its Value-Transformation Framework (VTF) to organize its training materials. The VTF, developed by NACHC's Quality Center, is a conceptual model to guide systems change by translating research and promising practices into manageable steps health centers can apply to improve care and outcomes. The Framework identifies 15 change areas across three domains: Infrastructure, Care Delivery, and People. You can learn more about the VTF at <https://www.nachc.org/clinical-matters/value-transformation-framework/>.

Within these Change Areas, we have arranged our resources based on identified leadership competencies. NACHC “maps” our training materials to these competencies to direct you to our most targeted resources. We will continue to build out our competency model to include other key roles in health centers.



This guide is designed to be used in tandem with the **NACHC Training and Technical Assistance Catalog**, which organizes materials using the VTF and the competencies framework. The Catalog provides only the description of the competency, while this quick guide provides a full description of the skill levels.

Competencies by Change Area

Click a competency to navigate. You can then select the "Index" button at the bottom right corner of each page to return to this page and select a new competency. Naturally, you can also browse through each change area's competencies.



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PATIENTS

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Training and Support

Transformational Mindset

Unconditional Respect

Work Life Balance



Care Delivery



PATIENT-CENTERED MEDICAL HOME

Skill: Manage change among the clinical staff as the health center moves into new care models (e.g., the Patient Centered Medical Home model)

| Level | Behavioral Examples |
|-----------|---|
| 5-Expert | <ul style="list-style-type: none">• Break new ground via “disruptive innovation” to create new approaches to clinical issues• Lead the execution of changes resulting from scenario planning and brainstorming sessions• Seek to find new and innovative ways to manage change and share those techniques with others• Demonstrate Skilled behaviors |
| 4-Skilled | <ul style="list-style-type: none">• Anticipate change by identifying and analyzing potential changes on the horizon• Identify and initiate new opportunities to pursue as a result of the changing health care model• Lead scenario planning sessions to identify possible changes and approaches• Lead brainstorming sessions for new ways to overcome the obstacles of changing circumstances• Coach others on how to align their work to meet changing circumstances• Demonstrate Applied behaviors |
| 3-Applied | <ul style="list-style-type: none">• Communicate the reason for changes in health center operations and how those changes impact the work of each staff member• Create new/modified health center organizational designs to meet mandates/initiatives and optimize clinical effectiveness/efficiency• Focus on the upside to changing situations as opposed to dwelling on the difficulties associated with them• Consistently realign work efforts to meet changing circumstances and priorities• Demonstrate Basic behaviors |

| | |
|------------|---|
| 2-Basic | <ul style="list-style-type: none"> • Understand the concepts of organizational culture and how these apply within the health center • Know basic planning concepts, as well as the health center's current Strategic Plan |
| 1-Learning | <ul style="list-style-type: none"> • Aware that clinical operations need to change as the center moves into new care models, but not sure how to implement changes without disrupting the culture of the center • View change as an obstacle to productivity at times |

Clinical Processes





PATIENT-CENTERED MEDICAL HOME

Skill: Create, implement, and maintain high-performing clinical processes and systems

| Level | Behavioral Examples |
|------------|--|
| 5-Expert | <ul style="list-style-type: none"> • Create tools, processes and systems that ensure consistent delivery of high-quality clinical care • Develop/implement innovative disease management programs using all appropriate tools/modalities • Anticipate issues related to regulatory changes that may impact systems or processes • Recognized as a resource for other health centers • Demonstrate Skilled behaviors |
| 4-Skilled | <ul style="list-style-type: none"> • Leverage tools, processes and systems created by other health center leaders that ensure consistent delivery of high quality clinical care • Apply change management techniques when changes in processes and systems are required • Demonstrate Applied behaviors |
| 3-Applied | <ul style="list-style-type: none"> • Implement and maintain systems (e.g., open access) that provide optimal access to health center services • Implement and maintain systems that support consistent clinical processes <ul style="list-style-type: none"> ○ Workflow management ○ Productivity optimization • Implement and maintain processes that support high quality clinical care |
| 2-Basic | <ul style="list-style-type: none"> • Use systems that support consistent clinical processes • Use systems that provide access to health center services • Understand fundamental health care access issues and related clinic scheduling concepts • Understand concepts and issues related to care planning/management/coordination |
| | <ul style="list-style-type: none"> • Understand basics of the health center's practice management system, and can utilize reports generated by that system) |
| 1-Learning | <ul style="list-style-type: none"> • Aware of the need to have processes and systems in place, but no experience implementing and maintaining them |





PATIENT-CENTERED MEDICAL HOME

Skill: Support center accreditation and Patient Centered Medical Home (PCMH) recognition

| Level | Behavioral Examples |
|------------|--|
| 5-Expert | <ul style="list-style-type: none">• Create new approaches on how the center can transform its practice and achieve accreditation• Demonstrate Skilled behaviors |
| 4-Skilled | <ul style="list-style-type: none">• Guide the health center's clinical component in achievement of accreditation and PCMH recognition• Demonstrate Applied behaviors |
| 3-Applied | <ul style="list-style-type: none">• Promote Practice Transformation, the Patient Centered Medical Home (PCMH) care model, and the basis of both in quality• Drive implementation and maintenance of the PCMH care model |
| 2-Basic | <ul style="list-style-type: none">• Understand health center accreditation, PCMH recognition, and the primary organizations that provide recognition:<ul style="list-style-type: none">○ The Joint Commission (TJC)○ Accreditation Association for Ambulatory Health Care (AAAHC)○ National Committee for Quality Assurance (NCQA)• Understand the impact of practice transformation and the PCMH care model on quality• Demonstrate knowledge of quality infrastructure and its integral importance to PCMH recognition |
| 1-Learning | <ul style="list-style-type: none">• Aware of the PCMH model and the significance of obtaining accreditation |

PCMH Accreditation



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POPULATION HEALTH MANAGEMENT

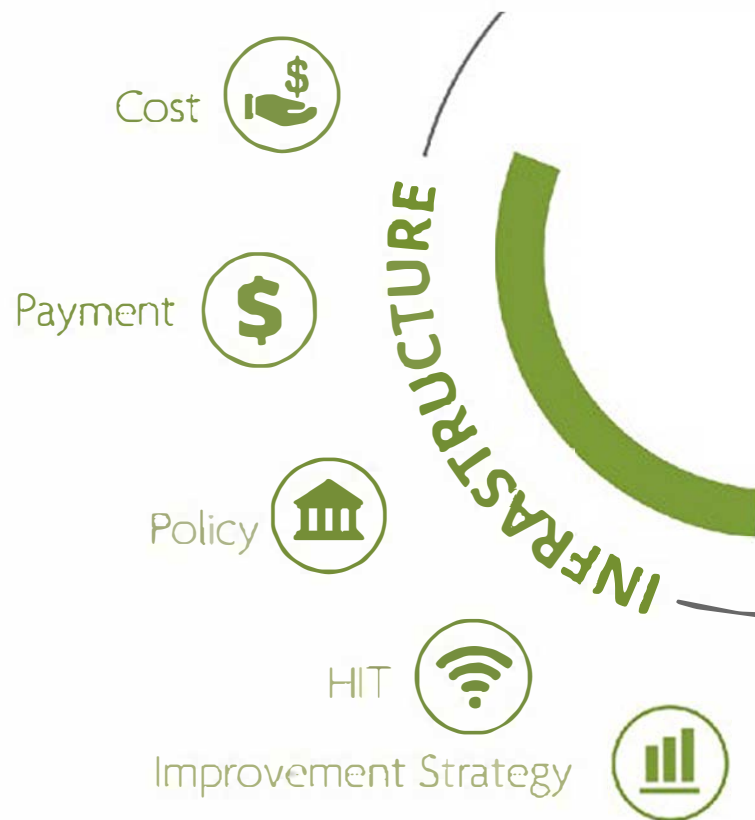
Skill: Actively work to integrate Public/Population Health issues with routine delivery of primary care

| Level | Behavioral Examples |
|------------|--|
| 5-Expert | <ul style="list-style-type: none">• Take a leadership role in initiatives to continually improve integration of primary care and Public/Population Health• Demonstrate Skilled behaviors |
| 4-Skilled | <ul style="list-style-type: none">• Actively promote outreach to positively affect broad community health• Guide the clinical team in actively addressing issues related to<ul style="list-style-type: none">○ Health disparities○ Health care access○ Social determinants of health• Demonstrate Applied behaviors |
| 3-Applied | <ul style="list-style-type: none">• Use results of Needs Assessments to set clinical strategy• Discern the value of potential partnerships/strategic alliances• Demonstrate Basic behaviors |
| 2-Basic | <ul style="list-style-type: none">• Understand Public/Population Health fundamentals (including public health reporting structures) and related local, state, and national dynamics• Know health Needs Assessment concepts, as well as the health center's current Assessment and priority populations• Understand government channels, mandates, and ethical considerations regarding:<ul style="list-style-type: none">○ Health disparities○ Health care access○ Social determinants of health |
| 1-Learning | <ul style="list-style-type: none">• Aware of Public/Population Health fundamentals, but not comfortable being ultimately responsible for aligning our care delivery to meet the needs of the population we serve |

Care Delivery



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Infrastructure



Skill: Ensure the development and effective management of accurate and efficient systems and processes for the health center's finance functions (for example, planning, budgeting, forecasting, accounting, billing, credit/collections, payroll, grants administration and reporting and decision support of financial and operational outcomes).

| Level | Behavioral Examples |
|------------|--|
| 5-Expert | <ul style="list-style-type: none"> • Demonstrate a deep understanding of the unique issues of importance in each of the health center's finance functions • Proactively communicate results, as necessary, to keep leadership team members and Board members informed on key strategic issues related to financial sustainability and/or compliance |
| 4-Skilled | <ul style="list-style-type: none"> • Anticipate and assesses opportunities for changes to health center systems and processes to promote added efficiency and effectiveness • Proactively makes changes to health center systems and processes to enhance finance team production |
| 3-Applied | <ul style="list-style-type: none"> • Ability to successfully manage tasks that must be completed for each of the health center's finance functions and can reliably assess accuracy of results obtained • Reliably manage finance team resources to accomplish successful outcomes for each of the health center's finance functions (for example, through creation of calendars for completion of required tasks/workflow expectations) |
| 2-Basic | <ul style="list-style-type: none"> • Demonstrate awareness of the systems and processes in place for each of the health center's finance functions, including timing issues inherent in each finance function (for example, tasks that are to be completed daily, weekly, monthly, quarterly, annually, etc.) • Recognize the importance of having efficient and effective systems and processes in place to support health center financial sustainability considerations |
| 1-Learning | <ul style="list-style-type: none"> • Learning about the health center's finance functions |

Benefits and Payroll



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Skill: Ensure the health center’s capital budget and resources are strategically aligned and effectively managed.

| Level | Behavioral Examples |
|------------|--|
| 5-Expert | <ul style="list-style-type: none"> • Articulate fiscal implications of planned capital outlays to leadership team members and Board members • Proactively engage with department leaders to establish expectations for appropriate and effective allocation of health center resources in support of Board approved strategic and financial plan goals and priorities • Establish need/expectation for self to be “at the table” when proposed capital acquisitions are vetted, and capital spending priorities are developed |
| 4-Skilled | <ul style="list-style-type: none"> • Lead the development of the health center’s capital budget • Collaborate with department leaders to gather information regarding capital investment needs |
| 3-Applied | <ul style="list-style-type: none"> • Contribute to the development of the health center’s capital budget • Demonstrate an understanding of how to align health center capital outlays with strategic needs and priorities |
| 2-Basic | <ul style="list-style-type: none"> • Recognize the importance of aligning health center capital outlays (including the timing of any such outlays) with strategic priorities • Can articulate the capital budget process |
| 1-Learning | <ul style="list-style-type: none"> • Learning about the health center’s capital budget process and how strategic capital needs/investments are prioritized |



Skill: Use financial tools and systems to effectively manage ongoing clinical operations

| Level | Behavioral Examples |
|------------|---|
| 5-Expert | <ul style="list-style-type: none"> • Create innovative approaches to budgeting that enhances our funding source opportunities • Demonstrate Skilled behaviors |
| 4-Skilled | <ul style="list-style-type: none"> • Use practice management systems, dashboards, etc. to optimize operations and generate clinically-related financial opportunities • Work with other managers to optimize the clinical budget • Coach others on how to analyze and leverage the data in health center financial statements • Demonstrate Applied behaviors |
| 3-Applied | <ul style="list-style-type: none"> • Use budgeting tools to generate, track, and maintain annual program budgets for the clinical team • Utilize analysis of financial statements to drive decisions about clinical operations • Actively participate in decisions regarding overall health center financial and budget development |
| 2-Basic | <ul style="list-style-type: none"> • Understand essential financial concepts and reporting tools <ul style="list-style-type: none"> ○ Income statement ○ Balance sheet • Understand basic budgeting principles and requirements regarding major health center funding sources |
| 1-Learning | <ul style="list-style-type: none"> • Aware of the purpose of the income statement and the balance sheet |

Financial Tools



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Skill: Ensure that the center takes optimal advantage of the federal 340B drug program

| Level | Behavioral Examples |
|------------|--|
| 5-Expert | <ul style="list-style-type: none">• Identify innovative ways to optimize ongoing results of the 340B program• Demonstrate Skilled behaviors |
| 4-Skilled | <ul style="list-style-type: none">• Coach Board and staff in 340B program maintenance and compliance• Demonstrate Applied behaviors |
| 3-Applied | <ul style="list-style-type: none">• Lead the center in successfully adopting the 340B program• Guide ongoing 340B program implementation and compliance• Demonstrate Basic behaviors |
| 2-Basic | <ul style="list-style-type: none">• Know specifics of the 340B drug program• Understand regulatory issues pertaining to the program and related compliance |
| 1-Learning | <ul style="list-style-type: none">• Know of the existence of 340B, but unaware of the specifics of the program |

Pharmacy Operations



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Skill: Direct the purchasing functions (for example, contract solicitation and maintenance, vendor selection, organization policies and procedures, etc.).

| Level | Behavioral Examples |
|------------|--|
| 5-Expert | <ul style="list-style-type: none"> Identify industry best practices and trends for analysis and consideration Establish and nurture relationships with key health center vendors |
| 4-Skilled | <ul style="list-style-type: none"> Enforce policies and procedures for purchasing functions and revise policies and procedures where opportunities for improvement are identified Educate and coach finance team members regarding purchasing and the impact on financial sustainability considerations |
| 3-Applied | <ul style="list-style-type: none"> Oversee purchasing activities to ensure compliance with policies procedures (for example, soliciting competitive bids for goods and services when required as part of the vendor selection process) Evaluate the value of purchasing groups and renegotiate as needed. Aware of federal regulatory requirements regarding contract and monitoring for health center goods and services paid for in whole or in part with federal grant/award dollars (familiar with Health Resources and Services Administration's (HRSA) Health Center Program Compliance Manual) |
| 2-Basic | <ul style="list-style-type: none"> Demonstrate awareness of policies and procedures regarding purchasing activities Contribute to data collection for analysis |
| 1-Learning | <ul style="list-style-type: none"> Learning about policies and procedures regarding purchasing activities |

Purchasing





Skill: Lead staff in adopting an ongoing Risk Management mindset/approach

| Level | Behavioral Examples |
|------------|---|
| 5-Expert | <ul style="list-style-type: none"> • Contribute new ideas on how to mitigate risk associated with provision of health center services • Demonstrate Skilled behaviors |
| 4-Skilled | <ul style="list-style-type: none"> • Lead ongoing modifications / improvements to the clinical component of the center's Risk Management Plan • Coach others on how to follow proper protocols with respect to the critical components of the health center's Risk Management Plan • Demonstrate Applied behaviors |
| 3-Applied | <ul style="list-style-type: none"> • Ensure that health center staff is aware of and executes the center's Risk Management Plan consistently across all critical components: <ul style="list-style-type: none"> ○ Quality Management ○ Clinical Management ○ Credentialing and Privileging ○ Patient Records ○ Patient Communications ○ Incident Reporting and Tracking |
| 2-Basic | <ul style="list-style-type: none"> • Understand Risk Management principles, HRSA's Risk Management requirements, and be familiar with own health center's Risk Management Plan |
| 1-Learning | <ul style="list-style-type: none"> • Aware of the importance of managing risk and avoiding malpractice lawsuits |

Risk Management



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Skill: Utilize advanced technology concepts beyond EHRs to optimize management of clinical functions

| Level | Behavioral Examples |
|------------|---|
| 5-Expert | <ul style="list-style-type: none"> • Create new and innovative approaches to leveraging technology to optimize management of clinical functions • Lead clinical team in ultimately utilizing “big data” techniques to advance optimal care quality and true Population Health • Demonstrate Skilled behaviors |
| 4-Skilled | <ul style="list-style-type: none"> • Lead the clinical team in promoting and utilizing advanced Electronic Health Record-related technology <ul style="list-style-type: none"> ○ Health Information Exchanges (HIEs) ○ Data warehouses • Lead clinical team in optimizing use of EHR and taking advantage of all related data-driven opportunities (analysis, etc.) • Demonstrate Applied behaviors |
| 3-Applied | <ul style="list-style-type: none"> • Can use main functions of the center’s EHR system to retrieve patient data and document assessments/interventions • Guide clinical team in successfully addressing operational issues regarding the health center’s EHR system • Guide staff in helping patients/families appropriately use online tools as part of care plans (including provider/patient communication via secure technologies) • Drive efforts to leverage technology to improve patient care |
| 2-Basic | <ul style="list-style-type: none"> • Understand advanced technology concepts beyond EHRs (such as HIEs and data warehouses) • Understand advantages of, and issues regarding, EHRs and their selection/implementation • Understand potential consumer applications enabling patients/families to access health and intervention information online |
| 1-Learning | <ul style="list-style-type: none"> • Aware of the existence of EHRs in a clinical environment • Aware of the existence of HEIs and data warehouses |





Skill: Lead clinical team in ensuring that all patient data is appropriately safeguarded, and that confidentiality is maintained, per HIPAA and other relevant regulations

| Level | Behavioral Examples |
|------------|--|
| 5-Expert | <ul style="list-style-type: none">• Leverage technology to create new and innovative approaches to securing and protecting the privacy of patient data• Demonstrate Skilled behaviors |
| 4-Skilled | <ul style="list-style-type: none">• Network with other agencies to better understand confidentiality• Demonstrate Applied behavior |
| 3-Applied | <ul style="list-style-type: none">• Consistently communicate to the health center staff the importance of protecting patient information as required by HIPAA regulations• Lead appropriate action to immediately and successfully address identified risk situations arising regarding HIPAA |
| 2-Basic | <ul style="list-style-type: none">• Understand HIPAA and other relevant regulations for safeguarding patient health information and confidentiality |
| 1-Learning | <ul style="list-style-type: none">• Aware of the legal requirement to keep patient information confidential |

Data Security





Skill: Effectively assist or provide oversight in Uniform Data System (UDS) report completion

| Level | Behavioral Examples |
|------------|--|
| 5-Expert | <ul style="list-style-type: none">• Create new and innovative approaches to complete clinical and related portions of the UDS reports in a timely and accurate manner<ul style="list-style-type: none">○ Checklists○ Workflow• Serve as a resource to other health centers on UDS data and improvement• Demonstrate Skilled behaviors |
| 4-Skilled | <ul style="list-style-type: none">• Coach others on how to complete clinical and related portions of the UDS reports accurately• Provide leadership to improve performance on UDS measures• Demonstrate Applied behavior |
| 3-Applied | <ul style="list-style-type: none">• Routinely provide assistance or oversight from the clinical perspective in completing UDS reports so that they get completed accurately and on time |
| 2-Basic | Understand basic UDS reports, but may need assistance in completing necessary clinical and related entries accurately |
| 1-Learning | <ul style="list-style-type: none">• Aware of the UDS reporting requirements, but do not know how to complete them |

UDS Oversight





IMPROVEMENT STRATEGY

Skill: Ensure that clinical and administrative operations are continuously aligned

| Level | Behavioral Examples |
|------------|--|
| 5-Expert | <ul style="list-style-type: none">▪ Monitor the industry to identify best practices for aligning the goals and objectives of clinical and administrative operations▪ Demonstrate Skilled behaviors |
| 4-Skilled | <ul style="list-style-type: none">▪ Follow best practices for aligning clinical and administrative operations▪ Mentor clinical and administrative staff members in taking ownership of, and actively maintaining, aligned strategic goals and related tactical objectives▪ Demonstrate Applied behaviors |
| 3-Applied | <ul style="list-style-type: none">▪ Ensure organizational success in continually meeting aligned clinical/administrative goals and related annual objectives▪ Work with appropriate C-suite staff to develop, and keep current, aligned clinical and administrative (including financial) long-range goals▪ Work with appropriate C-Suite staff to annually develop aligned short-term clinical and administrative (including financial) objectives that promote their respective long-range goals▪ Demonstrate Basic behaviors |
| 2-Basic | <ul style="list-style-type: none">• Fully understand clinical/administrative (including financial) alignment and its ramifications |
| 1-Learning | <ul style="list-style-type: none">• Aware of the need for alignment of clinical and administrative operations, but do not fully understand all related ramifications |

Alignment



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IMPROVEMENT STRATEGY

Skill: Use benchmarking to actively identify clinical improvement opportunities

| Level | Behavioral Examples |
|------------|---|
| 5-Expert | <ul style="list-style-type: none">• Create tools and templates to document process improvement and optimization ideas within our center• Seek out new approaches that will have the greatest impact on clinical outcomes• Demonstrate Skilled behaviors |
| 4-Skilled | <ul style="list-style-type: none">• Perceived internally as someone who is always considering ways to improve and optimize our processes• Demonstrate Applied behaviors |
| 3-Applied | <ul style="list-style-type: none">• Have a structured surveillance process for identifying clinical process improvement and optimization• Engage the team in evaluating benchmarking data to guide our process improvement initiatives |
| 2-Basic | <ul style="list-style-type: none">• Understand benchmarking• Understand performance metrics and related HRSA requirements• Pursue process improvement and optimization opportunities identified by others |
| 1-Learning | <ul style="list-style-type: none">• Aware of the use of benchmarking for comparing clinical operations to others, but have not utilized benchmarking data to make substantial changes to clinical operations |

Benchmarking



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IMPROVEMENT STRATEGY

Skill: Ensure that overall health center operations are consistent with generally-accepted business practices

| Level | Behavioral Examples |
|------------|--|
| 5-Expert | <ul style="list-style-type: none">• Create procedures that ensure operations follow efficient and effective business practices• Demonstrate Skilled behaviors |
| 4-Skilled | <ul style="list-style-type: none">• Ensure optimal results in all functional areas, from the perspectives of effectiveness, efficiency, regulatory and funder compliance, consistency, and productivity• Coach staff in developing an organizational culture that overtly values innovation in meeting ever-higher organizational standards• Demonstrate Applied behaviors |
| 3-Applied | <ul style="list-style-type: none">• Guide staff in fully understanding and actively addressing generally-accepted operational practices in their respective functional areas• Demonstrate Basic behaviors |
| 2-Basic | <ul style="list-style-type: none">▪ Know generally-accepted operational practices and business-focused results |
| 1-Learning | <ul style="list-style-type: none">▪ Aware that common processes and standards exist for operational business practices and results |

Business Practices



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IMPROVEMENT STRATEGY

Skill: Lead the development and alignment of the financial components of the health center's strategic plan.

| Level | Behavioral Examples |
|------------|---|
| 5-Expert | <ul style="list-style-type: none"> Collaborate with multiple departments and functions in the development of the financial components of the strategic plan Envision and lead the development of training, communications and procedures to enhance the alignment of the financial components of the health center's strategic plan Understand the finance role exists to support the service mission of the health center |
| 4-Skilled | <ul style="list-style-type: none"> Establish rules, procedures and processes for the health center to follow that support the finances of the HC strategic plan Enhance/improve efficiency of financial processes related to the strategic plan |
| 3-Applied | <ul style="list-style-type: none"> Oversee the implementation of existing rules, procedures and processes related to the strategic planning process Articulate how the finance department plan impacts/supports the health center strategic plan |
| 2-Basic | <ul style="list-style-type: none"> Articulate what a strategic plan is and how finance supports the plan Support the development of elements of the finance department plan |
| 1-Learning | <ul style="list-style-type: none"> Learning what a strategic plan is and how finance supports the plan Contribute to the strategic plan in discrete ways |

Financial Strategic Planning



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IMPROVEMENT STRATEGY

Skill: Maintain knowledge of current trends and information in health care, the health center movement and Financial Planning and Management.

| Level | Behavioral Examples |
|-----------|--|
| 5-Expert | <ul style="list-style-type: none"> • Practice informed reflection and action based upon the major changes that will occur in the next 10, 20 or more years ("Future Think") • Engage with and nurture relationships with peers/partners/colleagues who candidly provide transparent and forthcoming feedback and advice to help with self-assessment and development • Identify the behavioral modifications and strategies necessary for self-improvement |
| 4-Skilled | <ul style="list-style-type: none"> • Conduct in-service education on financial management to non-financial department directors • Ensure that financial reports and information shared with the Board support fully informed decision-making |
| 3-Applied | <ul style="list-style-type: none"> • Attend state, regional, Primary Care Association (PCA) and national conferences • Engage with a network of peers/partners to discuss current issues, trends and solutions • Review news and political action websites and other information outlets to stay abreast of outside influences on healthcare • Known to manage from a position of knowledge and experience • Seek out opinions/information and listen to staff members at all levels of the health center |
| 2-Basic | <ul style="list-style-type: none"> • Maintain thorough understanding of the current fiscal status of the health center • Use available data to make comparative analyses with state and national entities that are similar to the health center • Participate in educational activities |

| | |
|------------|---|
| 1-Learning | <ul style="list-style-type: none">• Maintain awareness of resources available at National Association of Community Health Centers (NACHC)• Familiar with the role of the Primary Care Association (PCA), resources available to support financial management of health centers and take part in PCA activities• Subscribe to and read healthcare periodicals, for example, Modern Healthcare, Healthcare Financial Management, etc. |
|------------|---|

Financial Trends





IMPROVEMENT STRATEGY

Skill: Successfully lead the health center in investigation and decision-making RE: new organizational models and opportunities (mergers/acquisitions, ACOs, value-based payment models, new market tax credits, etc.)

| Level | Behavioral Examples |
|------------|--|
| 5-Expert | <ul style="list-style-type: none">▪ Seen externally as a leader in helping to continuously enhance existing options and create new ones▪ Demonstrate Skilled behaviors |
| 4-Skilled | <ul style="list-style-type: none">▪ Coach Board and staff in successfully implementing desired organizational options▪ Mentor Board and staff in keeping abreast of trends and ongoing new options▪ Demonstrate Applied behaviors |
| 3-Applied | <ul style="list-style-type: none">▪ Lead Board and staff to a full understanding of new models, related issues, and potential options▪ Guide Board and staff in making appropriate decisions about which new options, if any, to pursue▪ Demonstrate Basic behaviors |
| 2-Basic | <ul style="list-style-type: none">▪ Understand fundamentals of new models, potential opportunities, and related issues |
| 1-Learning | <ul style="list-style-type: none">▪ Aware that new organizational and payment models/opportunities are becoming ascendant, but unable to fully describe them |

New Organizational Models





IMPROVEMENT STRATEGY

Skill: Ensure development and implementation of effective/efficient operational systems in all functional areas of the health center, both clinical and administrative

| Level | Behavioral Examples |
|-----------|--|
| 5-Expert | <ul style="list-style-type: none"> • Create systems, processes, and tools that ensure consistent delivery of high quality care and administrative support services • Create new and innovative approaches to time and project management that positively impact health center costs • Recognized by others as an expert in operational management; sought out to provide guidance • Anticipate issues related to regulatory changes that may impact health center systems or processes • Demonstrate Skilled behaviors |
| 4-Skilled | <ul style="list-style-type: none"> • Leverage tools, processes, and systems created by other health center leaders that ensures consistent delivery of high quality care and administrative support services • Take a collaborative leadership role within the health center regarding organizational planning and coordination • Apply effective change management techniques when modification of systems and/or processes is required • Demonstrate Applied behaviors |
| 3-Applied | <ul style="list-style-type: none"> • Ensure systems and related processes provide optimal access to health center services and generate high quality clinical outcomes • Ensure consistent operational processes <ul style="list-style-type: none"> ○ Workflow management Productivity optimization ○ Demonstrate Basic behaviors • Utilize structured project management techniques to plan, coordinate, and execute necessary functions <ul style="list-style-type: none"> • Assign responsibilities appropriately, to ensure coordination of functions • Ensure effective managerial development |

| | |
|------------|--|
| | <ul style="list-style-type: none"> • Prepare/lead staff meetings using recognized meeting management techniques • Demonstrate Basic behaviors |
| 2-Basic | <ul style="list-style-type: none"> • Understand systems and processes that support consistent clinical and administrative operations, including fundamentals of time/project management • Understand fundamental health care access issues and related scheduling concepts • Understand concepts and issues related to care planning/management/coordination • Understand basics of the health center's practice management system, and utilize reports generated by that system |
| 1-Learning | <ul style="list-style-type: none"> • Aware of the need to have efficient and effective operational systems/processes in place, but minimal experience implementing and maintaining them • Have limited training or experience with formalized time/project management techniques |

Operations





IMPROVEMENT STRATEGY

Skill: Actively participate and engage other clinical team members in effectively executing health center Quality Management activities

| Level | Behavioral Examples |
|-----------|--|
| 5-Expert | <ul style="list-style-type: none"> • Create new tools and techniques to monitor and measure quality programs • Demonstrate Skilled behaviors |
| 4-Skilled | <ul style="list-style-type: none"> • Mentor clinical staff regarding Quality Management (QM) concepts and techniques • Lead the clinical component of the health center's Quality Management program • Advocate on behalf of team for preventing "initiative overload" and QM fatigue • Guide the team in the pursuit of the Quadruple Aim • Demonstrate Applied behaviors |
| 3-Applied | <ul style="list-style-type: none"> • Use quality tools and techniques to measure/monitor processes and outcomes and creatively improve clinical performance <ul style="list-style-type: none"> ◦ Peer review ◦ Selected process improvement models ◦ Best Practice Guidelines • Can differentiate among alternative quality process improvement models while understanding their underlying commonalities • Continually monitor clinical performance through practice guidelines • Leverage best practice guidelines to identify and execute quality management initiatives <ul style="list-style-type: none"> ◦ Evidence-based practice guidelines ◦ Clinical Decision Support methods ◦ National Quality Forum ◦ AHRQ National Guidelines Clearinghouse |

| | |
|--------------------------------|---|
| ○ Pursuit of the Quadruple Aim | |
| 2-Basic | <ul style="list-style-type: none"> • Know the basics of a Quality Management Plan, and am familiar with the health center's own Plan • Understand traditional QM concepts • Understand “initiative overload” and QM fatigue • Understand both the national Quadruple Aim and the Chronic Care Model |
| 1-Learning | <ul style="list-style-type: none"> • Aware of the importance of quality programs |

Quality



INDEX



IMPROVEMENT STRATEGY

Skill: Utilize both “big picture” and detailed “system thinking” when analyzing issues and making decisions

| Level | Behavioral Examples |
|---------------|---|
| 5- Expert | <ul style="list-style-type: none">• Anticipate the impact of decisions on the long-term strategy of the health center• Develop new tools or templates for evaluating alternatives• Create new methods for locating data and how to analyze its accuracy and importance• Demonstrate Skilled behaviors |
| 4- Skilled | <ul style="list-style-type: none">• Ask strategic “generative” questions that challenge traditional thinking in order to understand an issue and pose alternatives that create new opportunities• Use a structured process for defining an issue, gathering data, generating and evaluating alternatives, selecting an alternative, and implementing and evaluating the alternative• Coach others on how to assess situations in order to make the most informed decisions about which course of action to pursue• Demonstrate Applied behaviors |
| 3- Applied | <ul style="list-style-type: none">• Identify information needed to make an informed decision about the strategic implications of a specific course of action• Think through the implications of a specific course of action and how it may affect the tactical operations of the health center• Consistently gather information from all stakeholders before making decisions• Use proven tools to evaluate alternatives relative to the needs and requirements of the stakeholders |
| 2-Basic | <ul style="list-style-type: none">• Can describe “strategic” vs. “tactical” thinking• Understand the skills needed to make decisions effectively |

| | |
|----------------|--|
| 1- Learning | <ul style="list-style-type: none">• Aware of the need to understand the strategic consequences of decisions, but do not have the practical experience to understand their impact• Recognize the complexities associated with making decisions |
|----------------|--|

Systems Thinking





IMPROVEMENT STRATEGY

Skill: Demonstrate advanced proficiency in office technologies

| Level | Behavioral Examples |
|------------|---|
| 5-Expert | <ul style="list-style-type: none">• Develop new approaches in how to leverage technology to improve the decision making, the actions and the productivity of the health center• Demonstrate Skilled behaviors |
| 4-Skilled | <ul style="list-style-type: none">• Coach others on how to use electronic technologies to increase their productivity and their decision making• Leverage database tools for optimizing decisions, actions, and opportunities• Possess advanced skill in common software applications<ul style="list-style-type: none">○ Excel (macros, pivot tables, IF statements, vlookup)○ PowerPoint (embedded media)○ Outlook (task assignment)• Demonstrate Applied behaviors |
| 3-Applied | <ul style="list-style-type: none">• Possess a good working knowledge of common software applications<ul style="list-style-type: none">○ Excel○ PowerPoint (transitions and builds)○ Outlook (automated reminders and scheduling meetings) |
| 2-Basic | <ul style="list-style-type: none">• Have basic skills in electronic office technologies (word processing, spreadsheet management, etc.) |
| 1-Learning | <ul style="list-style-type: none">• Aware of the availability and the importance of knowing how to use electronic productivity tools, but not quite comfortable with the technology |

Technological Proficiency



INDEX



Payment

Skill: Ensure complete, accurate and timely payor billing and grant drawdowns/ reimbursement to enable sufficient cash flow for ongoing health center activities.

| Level | Behavioral Examples |
|------------|--|
| 5-Expert | <ul style="list-style-type: none">• Closely monitor all key Revenue Cycle Management (RCM) indicators |
| 4-Skilled | <ul style="list-style-type: none">• Complete the Federal Finance Report (FFR) on quarterly and annual bases• Reconcile grant drawdowns to grant and operational budgets |
| 3-Applied | <ul style="list-style-type: none">• Ensure monthly grant drawdowns• Reconcile drawdowns to Federal Finance Report (FFR) balances |
| 2-Basic | <ul style="list-style-type: none">• Review unbilled reports on monthly basis |
| 1-Learning | <ul style="list-style-type: none">• Monitor bank accounts to validate cash levels• Review financial statements monthly to ensure accurate posting of all funds |

Cash Flow





Payment

Skill: Investigate, conduct financial analyses and make recommendations to help guide decision-making re: health center initiatives with major financial components or consequences [for example, Federal 340B drug program; Federal Torts Claims Act (FTCA) liability new/alternative organizational models and opportunities, such as mergers/acquisitions, major expansion, financing alternatives, etc.].

| Level | Behavioral Examples |
|-----------|---|
| 5-Expert | <ul style="list-style-type: none">• Can articulate results of financial analyses regarding complex health center initiatives to leadership team members and Board members in support of decision-making• Established as a skilled and trusted strategist who proactively looks for new programs/opportunities that align with health center goals and objectives, including adding financial value in support of the overall mission (for example, evaluation, planning and implementation of strategic growth initiatives such as mergers and acquisitions that support health center goals and objectives in a financially sustainable manner) |
| 4-Skilled | <ul style="list-style-type: none">• Skilled/highly effective in leading development and implementation of action plan/strategy to operationalize new and/or modify, as necessary, existing health center initiatives with major financial components or consequences• Educate and coach finance team members to increase team-wide awareness of the financial implications of strategic health activities |
| 3-Applied | <ul style="list-style-type: none">• Oversee analysis in support of decision-making and present options for consideration• Willing to engage external resources to assist with analysis and development of options when full knowledge of financial nuances of an initiative is not present within the health center team |

| | |
|------------|--|
| | <p>("knowwhat you don't know" and seek qualified help to fill knowledge gaps in support of decision-making)</p> <ul style="list-style-type: none"> • Possess a working knowledge of health center initiatives with major financial components or consequences |
| 2-Basic | <ul style="list-style-type: none"> • Familiar with health center initiatives with major financial components or consequences <p>Contribute to financial analysis in support of decision-making</p> |
| 1-Learning | <ul style="list-style-type: none"> • Learning about health center initiatives with major financial components or consequences • Assist with collection of data for analysis and decision-making |

Financial Analysis





Payment

Skill: Ensure that finance operations, policies and procedures are consistent with generally accepted accounting principles (GAAP) and are aligned with all federal, state, private and certification board regulations.

| Level | Behavioral Examples |
|-----------|--|
| 5-Expert | <ul style="list-style-type: none">• Can articulate complex health center financial reporting issues to leadership team members, Board members and external stakeholder users of health center financial reports (lenders, grantors, donors); including, specifically, alignment of financial reports with generally accepted accounting principles• Stay informed on changes (both required and proposed changes) to generally accepted accounting principles and demonstrates the ability to proactively model any such changes and inform internal and external users of health center financial reports as to the impact on financial reporting• Proactively monitor and manage changes to finance operations, policies and procedures to achieve compliance with generally accepted accounting principles |
| 4-Skilled | <ul style="list-style-type: none">• Possess a working knowledge of generally accepted accounting principles and can identify, understand and implement required changes in a timely and compliant manner• Educate and coach finance team members to improve team-wide understanding of the need for finance operations, policies and procedures to be consistent with generally accepted accounting principles |
| 3-Applied | <ul style="list-style-type: none">• Oversee implementation and maintenance of finance operations, policies and procedures to achieve compliance with generally accepted accounting principles (for example, in areas such as valuation of patient accounts receivable and revenue recognition)• Can articulate details of application of generally accepted accounting principles to the presentation of health center financial statements, including measurement of assets, liabilities, revenues, expenses and net assets• Ability to recognize when assistance is needed regarding proper application of generally accepted accounting principles to health center accounting and reporting matters and engages resources as needed to ensure consistency of policies and procedures with generally accepted accounting principles |
| 2-Basic | <ul style="list-style-type: none">• Demonstrate awareness of finance operations, policies and procedures |

| | |
|------------|--|
| | <ul style="list-style-type: none"> • Can articulate the application of generally accepted accounting principles to financial reporting |
| 1-Learning | <ul style="list-style-type: none"> • Learning about finance operations, policies and procedures • Aware of generally accepted accounting principles and their application to financial reporting |

GAAP



INDEX



Payment

Skill: Manage receivables [outside of patient Accounts Receivable (A/R)], banking, cash and investments by optimizing bank and deposit relationships and initiating appropriate strategies to enhance cash position/cash flow.

| Level | |
|------------|---|
| 5-Expert | <ul style="list-style-type: none">• Enforce cash management policies and procedures that drive balance sheet strength and support health center financial sustainability goals (embrace importance of a cash flow culture for the health center)• Lead identification of innovative solutions to enhance cash position/cash flow• Collaborate effectively with department heads to align operations with cash management strategy |
| 4-Skilled | <ul style="list-style-type: none">• Maintain an awareness of cash management best practices and measure/evaluate health center performance against established key performance indicator goals (for example, days in accounts receivable, days in accounts payable, days cash on hand)• Develop plan to accumulate or increase cash reserves• Conduct analyses of opportunities designed to enhance cash position/cash flow and makes recommendations as warranted |
| 3-Applied | <ul style="list-style-type: none">• Oversee cash management activities with a mindset that “cash is king” in support of the cash flow culture of the health center• Routinely report cash and investment activity results to leadership team members, including maintaining a rolling forecast of anticipated health center cash flows for business planning purposes (for example, maintaining a 12 to 18 month rolling forecast of anticipated cash flows)• Cultivate working relationship with financial institutions and investment brokers |
| 2-Basic | <ul style="list-style-type: none">• Familiar with health center financial institution and investment broker relationships• Understand basics of health center cash flow activities, including investing activities |
| 1-Learning | <ul style="list-style-type: none">• Learning about health center cash management policies and procedures |

Receivables



INDEX



PAYMENT

Skill: Ensure clinical staff awareness of reimbursement mechanisms and issues

| Level | Behavioral Examples |
|------------|---|
| 5-Expert | <ul style="list-style-type: none">• Work with other senior managers to create new and innovative approaches to leverage the reimbursement mechanisms available to the health center• Demonstrate Skilled behaviors |
| 4-Skilled | <ul style="list-style-type: none">• Act as a resource to other health center managers as an intermediary with the clinical staff• Demonstrate Applied behaviors |
| 3-Applied | <ul style="list-style-type: none">• Work with other members of the senior management team to communicate to the clinical staff the various reimbursement mechanisms important to the center• Work with the clinical staff to ensure they understand their role in maximizing health center reimbursement |
| 2-Basic | <ul style="list-style-type: none">• Develop understanding of reimbursement options/issues in health care• Risk based mechanisms• Public and private payers |
| 1-Learning | <ul style="list-style-type: none">• Have awareness of reimbursement mechanisms at the health center level, including Prospective Payment |

Reimbursement Mechanisms





POLICY

Skill: Continuously advocate for the health center and its community role with appropriate external entities.

| Level | Behavioral Examples |
|------------|---|
| 5-Expert | <ul style="list-style-type: none">• Work with community leaders and organizations that are engaged/ interested in health care to drive results and make meaningful progress toward health center initiatives• Collaborate with external entities to lead or establish community healthcare advocacy groups |
| 4-Skilled | <ul style="list-style-type: none">• Establish relationships with key community leaders and organizations that are engaged/interested in healthcare• Participate in local initiatives related to healthcare and health outcomes, for example, patient access, continuity |
| 3-Applied | <ul style="list-style-type: none">• Participate in local healthcare advocacy• Attend meetings and conferences |
| 2-Basic | <ul style="list-style-type: none">• Selectively join local healthcare advocacy group• Aware of advocacy groups and trainings that are available |
| 1-Learning | <ul style="list-style-type: none">• Learning the role of the health center in the local community.• Seek advice/guidance to improve understanding of advocacy |

Advocate for Community Role





POLICY

Skill: Advocate (within legal limits) for the role of the community health center with appropriate external entities

| Level | Behavioral Examples |
|------------|---|
| 5-Expert | <ul style="list-style-type: none">• Create new approaches to advocate for the health center• Demonstrate Skilled behaviors |
| 4-Skilled | <ul style="list-style-type: none">• Actively build positive relationships with, and help guide advocacy efforts between/among other health centers and public health agencies on behalf of the national Quadruple Aim• Guide outreach efforts to educate community residents about specific health center services• Demonstrate Applied behaviors |
| 3-Applied | <ul style="list-style-type: none">• Conduct legislative visits, as appropriate and allowed, with state and federal policy makers to educate them on the role and the importance of the community health center• Help raise community awareness of the center as a vital community resource |
| 2-Basic | <ul style="list-style-type: none">• Understand the roles of state and federal policy-makers in enabling health center operations (both financially and from a regulatory perspective) |
| 1-Learning | <ul style="list-style-type: none">• Aware of the need to build relationships with stakeholders that enable the operations of a community health center |

Advocate for Health Centers



INDEX



POLICY

Skill: Advocate for the health center and the health center movement with lawmakers and other agency/association/cause leaders (local, state and national).

| Level | Behavioral Examples |
|------------|--|
| 5-Expert | <ul style="list-style-type: none"> Educate lawmakers on the health center movement; invite them in for a tour, seek to answer their questions, and deepen their understanding of the populations served by the health center Proactively identify solutions for the health center movement and engage lawmakers, cause leaders, etc. to discuss next steps |
| 4-Skilled | <ul style="list-style-type: none"> Continually seek out and develop relationships with leaders who impact the health center movement Advocate for the health center and able to articulate the top issues |
| 3-Applied | <ul style="list-style-type: none"> Attend meetings and deepen understanding of the advocacy environment Speak to peers about local issues and understand the opportunities and threats |
| 2-Basic | <ul style="list-style-type: none"> Aware of advocacy groups and trainings that are available |
| 1-Learning | <ul style="list-style-type: none"> Explore current relationships between the health center and local, state, national leaders Receive guidance and coaching on accessing learning resources |

Advocate with External Entities



INDEX



POLICY

Skill: Oversee financial and pension audits including compliance with all applicable laws and reporting requirements and correspondence with external auditor and state/federal agencies.

| Level | Behavioral Examples |
|------------|---|
| 5-Expert | <ul style="list-style-type: none">• Articulate audit results to leadership team members, Board members (including the Finance Committee) and external stakeholder users of health center audit reports (lenders, grantors, donors)• Proactively work with leadership team members and Board members (including the Finance Committee) to develop and implement corrective action plans/measures where required |
| 4-Skilled | <ul style="list-style-type: none">• Educate and coach finance team members regarding health center audit processes• Proactively communicate with auditor and state/federal agencies to accommodate information flow and expedite completion of audit processes (including resolution of problems encountered during the audit process) |
| 3-Applied | <ul style="list-style-type: none">• Oversee health center audit processes and coordinate activities with external auditor and state/federal agencies• Coordinate gathering of information requested by external auditor (within the finance department and other departments as necessary) and provides information for completion of the audit processes |
| 2-Basic | <ul style="list-style-type: none">• Understand audit requirements related to the health center's financial statement audit; Single Audit in accordance with OMB Uniform Grants Guidance (if applicable); and employee benefit plan audit (if any) |
| 1-Learning | <ul style="list-style-type: none">• Learning about health center audit requirements |

Audits





POLICY

Skill: Guide the clinical team in actively identifying and addressing general FTCA-related issues

| Level | Behavioral Examples |
|------------|---|
| 5-Expert | <ul style="list-style-type: none">• Create new and streamlined procedures for identifying Federal Tort Claims Act (FTCA) issues and how they impact the health center• Demonstrate Skilled behaviors |
| 4-Skilled | <ul style="list-style-type: none">• Act immediately and appropriately regarding all issues relating to impaired providers• Demonstrate Applied behavior |
| 3-Applied | <ul style="list-style-type: none">• Assist with the Deeming and/or Redeeming application for the center• Ensure that all health center practitioners have the appropriate credentials and privileges as required• Ensure that all Quality Improvement requirements are met per FTCA guideline |
| 2-Basic | <ul style="list-style-type: none">• Understand fundamental regulations and issues regarding Federal Tort Claims Act and FTCA deeming |
| 1-Learning | <ul style="list-style-type: none">• Aware of the Federally Supported Health Centers Assistance Act and the Federal Tort Claims Act, and how the impunity they provide limits risk and liability of the health center |

FTCA



INDEX



POLICY

Skill: Develop clinical component of health center grant applications

| Level | Behavioral Examples |
|------------|--|
| 5-Expert | <ul style="list-style-type: none">• Identify and pursue new funding options• Demonstrate Skilled behaviors |
| 4-Skilled | <ul style="list-style-type: none">• Seek out and develop potential programs and ideas for new grant funding• Demonstrate Applied behaviors |
| 3-Applied | <ul style="list-style-type: none">• Develop clinical component of the health center grant applications• Able to justify the funds requested in the grant application• Responsible for monitoring successful implementation of clinical components of grants• Responsible for reporting on clinical components |
| 2-Basic | <ul style="list-style-type: none">• Have basic understanding of grant-writing and fund sources (public and private)• Have awareness of the clinical components of the health centers grants (public and private)• Help develop grant applications |
| 1-Learning | <ul style="list-style-type: none">• Aware of the need to apply for health center grants to fund clinical operations |

Grant Applications: Clinical Leaders



INDEX



POLICY

Skill: Ensure timely and successful completion of health center grant applications (i.e., Section 330 and other public grants), and related reporting

| Level | Behavioral Examples |
|------------|---|
| 5-Expert | <ul style="list-style-type: none">• Identify and pursue new public grant funding options• Create new processes to streamline the completion of grant applications• Demonstrate Skilled behaviors |
| 4-Skilled | <ul style="list-style-type: none">• Seek out potential programs and ideas for new grant funding• Coach others on how to complete grant applications• Demonstrate Applied behaviors |
| 3-Applied | <ul style="list-style-type: none">• Ensure successful procurement and implementation of public grants• Able to justify funds requested in grant applications• Ensure appropriate reporting of grant results<ul style="list-style-type: none">○ Progress reports○ Grant close-out reports○ Non-competing continuing applications• Demonstrate Basic behaviors |
| 2-Basic | <ul style="list-style-type: none">• Have basic understanding of grant-writing and public fund sources• Know the multiple components of health center public grants |
| 1-Learning | <ul style="list-style-type: none">• Aware of the need to apply for health center grants to fund operations |

Grant Applications: CEOs



INDEX



Skill: Ensure financial compliance with all grant requirements (including Section 330, state, local and foundation) and Health Resources.

| Level | Behavioral Examples |
|------------|---|
| 5-Expert | <ul style="list-style-type: none"> Develop tracking format/procedure for the drawdown and use of funds over the life of the grant Analyze and report findings and recommendations on a monthly basis to health center administration and Board of Directors Ensure utilization of funds complies with the certificate of award and the stated purpose(s) |
| 4-Skilled | <ul style="list-style-type: none"> Develop a grants management protocol Develop a schedule for utilization of funds consistent with the designated grant period |
| 3-Applied | <ul style="list-style-type: none"> Understand the content and parameters of the certificate of award documents associated with all grants Develop budget based on certificate of award specifications Review all drawdowns and subsequent utilization of funds |
| 2-Basic | <ul style="list-style-type: none"> Track utilization of funds in the operational system of the health center Code expenses accurately by fund and correct grant numbers in the General Ledger (G/L) |
| 1-Learning | <ul style="list-style-type: none"> Familiar with all grants, their associated sources and intents Understand the overall process of grants management |

Grant Compliance: CFO



INDEX



POLICY

Skill: Demonstrate a comprehensive understanding of the unique dynamics of the health center model

| Level | Behavioral Examples |
|------------|--|
| 5-Expert | <ul style="list-style-type: none">• Take a leadership role in actively advancing the national health center priorities• Demonstrate Skilled behaviors |
| 4-Skilled | <ul style="list-style-type: none">• Understand forces specifically shaping the delivery of health care for a 5-10 year horizon• Demonstrate Applied behaviors |
| 3-Applied | <ul style="list-style-type: none">• Can explain to health center personnel how health centers fit into state/national health systems• Can describe the dynamics of the health care system at all levels• Demonstrate Basic behaviors |
| 2-Basic | <ul style="list-style-type: none">• Know common health center terminology and appropriate government acronyms• Know reporting requirements• Know the history of the health center movement• Demonstrate Learning behaviors |
| 1-Learning | <ul style="list-style-type: none">• Working to understand the history of the health center movement |

Health Center Model



INDEX



Skill: Demonstrate the ability to work fluidly with governmental agencies and other funding sources that support health centers

| Level | Behavioral Examples |
|------------|---|
| 5-Expert | <ul style="list-style-type: none">• Create innovative approaches on how to navigate and leverage relationships with government entities and other funding sources that support health centers• Anticipate how changes in legislation may impact health center operations• Demonstrate Skilled behaviors |
| 4-Skilled | <ul style="list-style-type: none">• Routinely leverage governmental and other funding agent structures and initiatives to create new opportunities for the health center• Demonstrate Applied behaviors |
| 3-Applied | <ul style="list-style-type: none">• Help develop project and funding applications• Assist with periodic reporting• Communicate as needed on related issues and opportunities• Demonstrate Basic behaviors |
| 2-Basic | <ul style="list-style-type: none">• Understand governmental/funding source structures, relationships, and requirements pertaining to health centers, including the CHC Program's "19 Requirements" from (HRSA/BPHC) |
| 1-Learning | <ul style="list-style-type: none">• Aware of the need to work with governmental and other funding sources, but not sure how they impact our health center |

Work with Agencies



INDEX



People



CARE TEAMS

Skill: Instill a sense of true teamwork among stakeholders

| Level | Behavioral Examples |
|------------|---|
| 5-Expert | <ul style="list-style-type: none">• Search for and implement best practices for creating a team-oriented environment• Anticipate and prepare for possible discord with scenario planning• Demonstrate Skilled behaviors |
| 4-Skilled | <ul style="list-style-type: none">• Effectively direct collaboration and service delivery of the broad clinical team (internal and external)• Create a shared understanding and appreciation of all team member roles/responsibilities, including professionals representing integrated disciplines such as behavioral health, dental services, etc.• Develop a cadence for scheduling formal one-on-ones with team members to discuss projects, challenges, and resolutions• Demonstrate Applied behaviors |
| 3-Applied | <ul style="list-style-type: none">• Create a clinical environment in which innovation is valued and rewarded• Communicate regularly with my team• Guide shared decision making with stakeholders<ul style="list-style-type: none">○ Share all relevant information (as permitted by HIPAA)• Proactively identify informal ways to meet and discuss relevant issues with specific team members• Determine how best to share information with others in the group• Participate actively in team meetings |
| 2-Basic | <ul style="list-style-type: none">• Understand common concepts for forming and maintaining a true interdisciplinary team |
| 1-Learning | <ul style="list-style-type: none">• Aware of the importance of effective teamwork, and support other members of the health center team in whatever ways I can when they ask for it |

Teamwork



INDEX



LEADERSHIP

Plan, develop and conduct effective and efficient communications; prepare and communicate business reports to support stakeholder understanding

| Level | Behavioral Examples |
|-----------|--|
| 5-Expert | <ul style="list-style-type: none">• Demonstrate a deep understanding of health center issues and prioritize needs• Communicate persuasively with stakeholders in ways that help them embrace the need for taking specific actions to improve availability, accessibility, affordability and quality of health care services• Develop and coach direct reports to demonstrate communication skills listed at the competent level• Model meeting management skills and discipline and expect same for meetings managed by direct reports• Establish environment and expectations where barriers to meeting deadlines are communicated promptly up the chain to the level that needs to know them and are resolved at the lowest possible level |
| 4-Skilled | <ul style="list-style-type: none">• Lead workgroups to identify the key issues, collaborate with various stakeholders to prioritize the messaging and drive results• Educate decision makers, seek to answer their questions and provide access to health center outcomes• Manage meetings in an efficient, effective and judicious manner• Demonstrate high level of professionalism and effectiveness in email communication: email chains steer an issue to a desired resolution and show tact, brevity, clarity, focus; recipients are judiciously and correctly apportioned between "To," "Copy (Cc)," and "Blind copy (Bcc)"; assignments are clear with correct deliverables and expected due dates |

| | |
|------------|---|
| 3-Applied | <ul style="list-style-type: none"> • Articulate the factors that influence the environment, the strengths and weaknesses, and key stakeholders who contribute to the daily movement • Establish relationships with peers and leaders who are leading the health center movement and related issues; partner with them to identify solutions • Compose documents that are sufficiently polished to be used as a model for new hires • Communicate in manner that fosters staff initiative and learning, and models proper discourse. |
| 2-Basic | <ul style="list-style-type: none"> • Demonstrate knowledge of the health center movement • Participate in advocacy groups and trainings that are available • Produce business communications that require minimal oversight and editing. • Demonstrate on point and concise communication at meetings; meetings start and end on time • Conduct team leadership assignments with respect for participants |
| 1-Learning | <ul style="list-style-type: none"> • Aware of the need to comply with requirements of all grant funders (including HRSA), but less than fully knowledgeable about those requirements |

Business Communication





LEADERSHIP

Skill: Successfully navigate change as a leader and provide support for the clinical team as the health center adopts new initiatives and addresses new care model

| Level | Behavioral Examples |
|------------|--|
| 5-Expert | <ul style="list-style-type: none">• Seen as mentor, both internally and with related external parties, in effectively dealing with stressors resulting from environmental or organizational change• Demonstrate Skilled behaviors |
| 4-Skilled | <ul style="list-style-type: none">• Communicate genuine empathy with the clinical team with regards to their responses to significant change• Coach clinical team in successfully overcoming negative responses to significant change• Demonstrate Applied behaviors |
| 3-Applied | <ul style="list-style-type: none">• Employ self-awareness and Change Management theory in positively managing own responses to significant health care and organizational change• Employ Change Management theory in positively managing clinical team responses to significant changes in health care and the health center organization• Demonstrate Basic behaviors |
| 2-Basic | <ul style="list-style-type: none">• Know Change Management theory• Have understanding of responses to change by self and others |
| 1-Learning | <ul style="list-style-type: none">• Have some awareness of responses to change by self and others |

Change Management





LEADERSHIP

Skill: Plan, develop and conduct effective and efficient communications; prepare and communicate business reports to support stakeholder understanding and decision making and conduct impactful meetings.

| Level | Behavioral Examples |
|-----------|--|
| 5-Expert | <ul style="list-style-type: none">• Demonstrate a deep understanding of health center issues and prioritize needs• Communicate persuasively with stakeholders in ways that help them embrace the need for taking specific actions to improve availability, accessibility, affordability and quality of health care services• Develop and coach direct reports to demonstrate communication skills listed at the competent level• Model meeting management skills and discipline and expect same for meetings managed by direct reports• Establish environment and expectations where barriers to meeting deadlines are communicated promptly up the chain to the level that needs to know them and are resolved at the lowest possible level |
| 4-Skilled | <ul style="list-style-type: none">• Lead workgroups to identify the key issues, collaborate with various stakeholders to prioritize the messaging and drive results• Educate decision makers, seek to answer their questions and provide access to health center outcomes• Manage meetings in an efficiently, effectively and judiciously• Demonstrate high level of professionalism and effectiveness in email communication: email chains steer an issue to a desired resolution and show tact, brevity, clarity, focus; recipients are judiciously and correctly apportioned between “To,” “Copy (Cc),” |

| | |
|------------|---|
| | and “Blind copy (Bcc)””; assignments are clear with correct deliverables and expected due dates |
| 3-Applied | <ul style="list-style-type: none"> • Articulate the factors that influence the environment, the strengths and weaknesses, and key stakeholders who contribute to the daily movement • Establish relationships with peers and leaders who are leading the health center movement and related issues; partner with them to identify solutions • Compose documents that are sufficiently polished to be used as a model for new hires • Communicate in manner that fosters staff initiative and learning, and models a discourse that discourages off- |
| 2-Basic | <ul style="list-style-type: none"> • Demonstrate knowledge of the health center movement • Participate in advocacy groups and trainings that are available • Produce business communications that require minimal oversight and editing. • Demonstrate on point and concise communication at meetings; meetings start and end on time • Conduct team leadership assignments with respect for participants |
| 1-Learning | <ul style="list-style-type: none"> • Receive guidance and coaching on accessing learning resources • Know when to seek out feedback prior to distributing ommunications, reports and presentations |

Communication





LEADERSHIP

Skill: Ensure compliance with all grant requirements and HRSA's compliance manual

| Level | Behavioral Examples |
|------------|---|
| 5-Expert | <ul style="list-style-type: none">• Seen as expert mentor on HRSA and other grant funder requirements• Whenever possible, participate in groups and meetings charged with developing new or modified grant funder requirements• Demonstrate Skilled behaviors |
| 4-Skilled | <ul style="list-style-type: none">• Coach Board and staff in keeping abreast of ongoing changes in requirements of all grant funders• Demonstrate Applied behaviors |
| 3-Applied | <ul style="list-style-type: none">• Lead Board and staff in complying with all HRSA requirements• Lead Board and staff in complying with all requirements of other grant funders• Know, and appropriately reference, compliance-related resources from PCAs and NACHC• Demonstrate Basic behaviors |
| 2-Basic | <ul style="list-style-type: none">• Know specifics of HRSA Health Center Program Compliance Manual• Know requirements of other grant funders |
| 1-Learning | <ul style="list-style-type: none">• Aware of the need to comply with requirements of all grant funders (including HRSA), but less than fully knowledgeable about those requirements |

CEO: Compliance



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LEADERSHIP

Skill: Ensure compliance with all grant requirements and HRSA's compliance manual

| Level | Behavioral Examples |
|------------|---|
| 5-Expert | <ul style="list-style-type: none">• Seen as expert mentor on HRSA and other grant funder requirements• Whenever possible, participate in groups and meetings charged with developing new or modified grant funder requirements• Demonstrate Skilled behaviors |
| 4-Skilled | <ul style="list-style-type: none">• Coach Board and staff in keeping abreast of ongoing changes in requirements of all grant funders• Demonstrate Applied behaviors |
| 3-Applied | <ul style="list-style-type: none">• Lead Board and staff in complying with all HRSA requirements• Lead Board and staff in complying with all requirements of other grant funders• Know, and appropriately reference, compliance-related resources from PCAs and NACHC• Demonstrate Basic behaviors |
| 2-Basic | <ul style="list-style-type: none">• Know specifics of HRSA Health Center Program Compliance Manual• Know requirements of other grant funders |
| 1-Learning | <ul style="list-style-type: none">• Aware of the need to comply with requirements of all grant funders (including HRSA), but less than fully knowledgeable about those requirements |

Compliance: CFO



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LEADERSHIP

Skill: Demonstrate commitment to the highest standards of ethical responsibility

| Level | Behavioral Examples |
|------------|--|
| 5-Expert | <ul style="list-style-type: none">• Create ethical dilemma scenarios/simulations for health center training purposes• Demonstrate Skilled behaviors |
| 4-Skilled | <ul style="list-style-type: none">• Actively lead health center efforts to meet the highest ethical standards in all health care issues• Guide members of the clinical team in how to address ethical dilemmas• Demonstrate Applied behaviors |
| 3-Applied | <ul style="list-style-type: none">• Consistently and frequently communicate the ethical standards of the health center to the health center clinical staff• Model the ethical behavior advocated• Provide avenue for discussion of ethical issues for staff and managers |
| 2-Basic | <ul style="list-style-type: none">• Understand governmental channels and critical dynamics regarding ethically-related considerations (right-to-life/end-of-life issues, HIV/AIDS services, etc.) |
| 1-Learning | <ul style="list-style-type: none">• Aware of the importance of maintaining high ethical standards |

Ethics



INDEX



LEADERSHIP

Skill: Ensure the development and effective management of accurate and efficient systems and processes for the health center's finance functions (for example, planning, budgeting, forecasting, accounting, billing, credit/collections, payroll, grants administration and reporting and decision support of financial and operational outcomes).

| Level | Behavioral Examples |
|------------|---|
| 5-Expert | <ul style="list-style-type: none">• Demonstrate a deep understanding of the unique issues of importance in each of the health center's finance functions• Proactively communicate results, as necessary, to keep leadership team members and Board members informed on key strategic issues related to financial sustainability and/or compliance |
| 4-Skilled | <ul style="list-style-type: none">• Anticipate and assesses opportunities for changes to health center systems and processes to promote added efficiency and effectiveness• Proactively makes changes to health center systems and processes to enhance finance team production |
| 3-Applied | <ul style="list-style-type: none">• Ability to successfully manage tasks that must be completed for each of the health center's finance functions and can reliably assess accuracy of results obtained• Reliably manage finance team resources to accomplish successful outcomes for each of the health center's finance functions (for example, through creation of calendars for completion of required tasks/workflow expectations) |
| 2-Basic | <ul style="list-style-type: none">• Demonstrate awareness of the systems and processes in place for each of the health center's finance functions, including timing issues inherent in each finance function (for example, tasks that are to be completed daily, weekly, monthly, quarterly, annually, etc.)• Recognize the importance of having efficient and effective systems and processes in place to support health center financial sustainability considerations |
| 1-Learning | <ul style="list-style-type: none">• Learning about the health center's finance functions |

Financial Team Management



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LEADERSHIP

Skill: Ensure that financial and administrative operations are continuously aligned.

| Level | Behavioral Examples |
|------------|--|
| 5-Expert | <ul style="list-style-type: none">• Engage with leadership team members to identify best practices in aligning financial and administrative operations• Ensure appropriate communication of health center goals so alignment of operations is done in an effective manner that supports health center financial sustainability considerations |
| 4-Skilled | <ul style="list-style-type: none">• Skilled/highly effective in leading development and implementation of action plan/strategy to enhance the alignment of health center financial and administrative operations• Collaborate internally to foster a culture of cooperation and trust among finance and other administrative team members |
| 3-Applied | <ul style="list-style-type: none">• Able to assess alignment of financial and administrative operations and identify opportunities for improvement• Develop a workable plan of action/strategy to realign financial and administrative operations where opportunities for improvement are identified• A team player who is not afraid to reach out to others to assist with problem solving (willing to consider multiple points of view to enhance outcome of action plan/strategy development) |
| 2-Basic | <ul style="list-style-type: none">• Possess basic knowledge of the health center's administrative operations and how the finance function supports/aligns with administrative activities (human resources, information technology, etc.) |
| 1-Learning | <ul style="list-style-type: none">• Learning about financial and administrative operations• Aware of importance of aligning financial and administrative operations to advance health center goals |





LEADERSHIP

Skill: Ensure timely, accurate, and (as appropriate) broadly distributed fiscal reporting as required for internal/external business communications, decision making and financial management.

| Level | Behavioral Examples |
|-----------|--|
| 5-Expert | <ul style="list-style-type: none">Established as a trusted financial leader using innovative approaches to deepen internal and external users' understanding of health center finances and their roles in contributing to its financial healthInterpret and predict the impacts of current financial trends on health center sustainability considerations for business decision-making |
| 4-Skilled | <ul style="list-style-type: none">Routinely engage with the Board of Directors, including the Finance Committee, regarding health center financial performance (including progress being made toward achievement of Board approved financial goals and objectives), and strategic financial planning mattersLead the development and presentation of financial reports to internal and external users of health center financial informationProactively communicate with stakeholders (lenders, grantors, donors) regarding health center financial outcomes and emerging trends |
| 3-Applied | <ul style="list-style-type: none">Contribute to the development of financial reports for use by internal and external users of health center financial informationReliably manage finance team resources to accomplish timely and accurate completion of health center financial reports (for example, through creation of calendars for completion of required tasks/workflow expectations) |

| | |
|------------|---|
| | <ul style="list-style-type: none"> • Identify appropriate reporting timeframes and routinely monitor (and adjust as necessary) financial reporting processes to ensure health center financial reports are prepared in a timely and accurate manner |
| 2-Basic | <ul style="list-style-type: none"> • Understand and can fully explain each of the basic financial statements included in the health center's financial reporting package (balance sheet, statement of operations and statement of cash flows) • Possess basic knowledge of information needs of financial report users, including an awareness of the frequency of users' needs (for example, financial reports that are required monthly, quarterly, annually) |
| 1-Learning | <ul style="list-style-type: none"> • Learning about health center financial reporting and the end-users of financial information • Understand the importance of timely and accurate financial reports for business decision making |

Fiscal Reporting





LEADERSHIP

Skill: Demonstrate knowledge of the current health care environment, including all relevant regulations

| Level | Behavioral Examples |
|------------|---|
| 5-Expert | <ul style="list-style-type: none">• Through innovation, insight, and mentorship, position the center as a primary care leader within the community• Demonstrate Skilled behavior |
| 4-Skilled | <ul style="list-style-type: none">• Through adaptive leadership (coaching and teamwork), guide the center through changes and/or trends that will impact future operations• Demonstrate Applied behaviors |
| 3-Applied | <ul style="list-style-type: none">• Through knowledge of government regulations and funding guidelines, successfully lead the center through routine provider* /patient transactions and organizational supporting activities *(NOTE: Per federal guidelines, "providers" include doctors of medicine or osteopathy, podiatrists, dentists, chiropractors, clinical psychologists, optometrists, nurse practitioners, nurse-midwives, and clinical social workers authorized to practice by the State and who are performing within their scope of practice as defined by State law.)• Demonstrate Basic behaviors |
| 2-Basic | <ul style="list-style-type: none">• Understand fundamental dynamics among/between providers, payers, patients, legislators, and funders |
| 1-Learning | <ul style="list-style-type: none">• Aware of the primary forces impacting providers, payers, and patients, as well as basic regulations affecting health centers |

Health Center Environment



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LEADERSHIP

Skill: Demonstrate effective leadership qualities

| Level | Behavioral Examples |
|------------|--|
| 5-Expert | <ul style="list-style-type: none">• Be an ambassador for accountability, responsibility, and reasonableness• Other health center leaders seek out my advice on leading the center• Demonstrate Skilled behaviors |
| 4-Skilled | <ul style="list-style-type: none">• Use recognized personality assessment tools and leadership style assessments to optimize leadership effectiveness<ul style="list-style-type: none">○ Myers-Briggs Type Indicator○ DISC analysis• Demonstrate Applied behaviors |
| 3-Applied | <ul style="list-style-type: none">• Understand all viewpoints before making decisions, and explain decisions to gain needed acceptance |
| 2-Basic | <ul style="list-style-type: none">• Know basic Leadership principles and styles• Describe how Leadership differs from Management |
| 1-Learning | <ul style="list-style-type: none">• Aware of the importance of effective leadership in the health center, but have no experience in how to use assessment tools to guide me |

Leadership



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LEADERSHIP

Skill: Demonstrate the ability to effectively carry out general management functions

| Level | Behavioral Examples |
|------------|---|
| 5-Expert | <ul style="list-style-type: none">• Create new and innovative approaches to time and project management that can positively impact the execution of clinical functions• Seek and create new ways of organizing work for maximum productivity and to ensure cost-effective and timely project results• Project management tools and templates• Recognized as an expert by others – sought out to provide guidance• Demonstrate Skilled behaviors |
| 4-Skilled | <ul style="list-style-type: none">• Take a collaborative leadership role within the health center regarding organizational planning and coordination• Coach others on how to develop responses to possible scenarios before they occur• Demonstrate Applied behaviors |
| 3-Applied | <ul style="list-style-type: none">• Utilize structured project management techniques to plan, coordinate and execute clinical functions• Assign responsibilities as appropriate to assist in coordination of clinical functions• Monitor execution of assignments to ensure activities are accomplished according to the plan• Consistently plan clinical functions in advance and respond to changing circumstances by modifying the plan• Prepare/lead clinical staff meetings using recognized meeting management techniques |
| 2-Basic | <ul style="list-style-type: none">• Understand the fundamental concepts of time/meeting/project management |
| 1-Learning | <ul style="list-style-type: none">• Have limited training or experience with formalized time management and or project management techniques |





LEADERSHIP

Skill: Leverage marketing opportunities and social media to continuously enhance the health center's image within the community and among external constituencies

| Level | Behavioral Examples |
|------------|--|
| 5-Expert | <ul style="list-style-type: none">• Write blogs on a monthly basis concerning primary care issues and how our center is helping to address them• Often requested to speak at industry events• Demonstrate Skilled behaviors |
| 4-Skilled | <ul style="list-style-type: none">• Lead discussions on relevant social media channels concerning health issues facing community• Demonstrate Applied behavior |
| 3-Applied | <ul style="list-style-type: none">• Actively seek out and undertake presentations that effectively represent the health center and the health center model to constituent groups and other external parties, in order to advance the health center mission and leverage new opportunities• Use LinkedIn and other relevant social media channels to expand my presence in the community• Make effective presentations as requested to internal and external groups |
| 2-Basic | <ul style="list-style-type: none">• Articulate basic public relations principles (including marketing, social media, etc.)• Have basic presentation skills and ability to use presentation software |
| 1-Learning | <ul style="list-style-type: none">• Aware of the importance of marketing the value and the capabilities of the health center to the community, but have no experience in social media channels to accomplish that objective |

Marketing and Social Media



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LEADERSHIP

Skill: Align clinical and tactical operations with the health center's mission, vision, and values

| Level | Behavioral Examples |
|------------|--|
| 5-Expert | <ul style="list-style-type: none">• Provide active leadership in creation of long-term goals and measurable objectives for the clinical component of the health center's long-term Strategic Plan• Initiate creative approaches to enhancing the reach of health centers to all customers and stakeholders through:<ul style="list-style-type: none">○ Improved funding○ Innovative care delivery models○ Alternatives to established health care mechanisms• Demonstrate Skilled behavior |
| 4-Skilled | <ul style="list-style-type: none">• Guide the clinical team in keeping patients, families, and the community at the heart of decision-making regarding health center services• Coach others on how to ensure that annual goals and objectives are aligned with the health center's long-term strategy• Demonstrate Applied behaviors |
| 3-Applied | <ul style="list-style-type: none">• Annually, set and communicate specific and measurable goals and objectives for employees that align with the health center's mission, vision and values• Create a sense of shared mission, vision, values, and goals among all clinical team members• Ensure that employees know how their work contributes to the health center's mission• Demonstrate Basic behavior |
| 2-Basic | <ul style="list-style-type: none">• Articulate and fully understand concepts of Mission, Vision, and Values, and how these are applied within the health center and its external environment• Understand and commit to the health center's mission of service to under-served populations |
| 1-Learning | <ul style="list-style-type: none">• Aware of the need to set measurable objectives and goals, but lack experience in aligning those goals to the long-term mission and vision of an organization |

Mission, Vision and Values



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LEADERSHIP

Skill: As Board-supervised authorizing official for the center, exercise positive stewardship with all stakeholders

| Level | Behavioral Examples |
|------------|---|
| 5-Expert | <ul style="list-style-type: none">Find innovative ways to continuously enhance CEO and center relationships with all major stakeholdersDemonstrate Skilled behaviors |
| 4-Skilled | <ul style="list-style-type: none">Keep all stakeholders informed of activities impacting them, and of the strong relationships of the center and the CEO with other stakeholdersCoach Board and staff on how to continuously foster strong, positive relationships with one another and with external stakeholdersDemonstrate Applied behaviors |
| 3-Applied | <ul style="list-style-type: none">Successfully develop and continuously maintain strong and positive relationships with all major internal and external stakeholdersExecute tasks generally required of the authorized business official for the center<ul style="list-style-type: none">Signatory for internal and external documentsCommunity "face" of the organizationDesignated center negotiatorPoint of contact for internal and external stakeholdersDemonstrate Basic behaviors |
| 2-Basic | <ul style="list-style-type: none">Fully understand methods and techniques for creating/maintaining mutually-supportive relationships with all major stakeholders |
| 1-Learning | <ul style="list-style-type: none">Know the need for strong relationships with internal and external parties at multiple levels, but unsure how to accomplish this |

Stewardship



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LEADERSHIP

Skill: Cultivate and maintain strategic external relationships [including, but not limited to federal/ Health Resources and Services Administration (HRSA), state and local regulatory agencies; Primary Care Associations (PCAs); National Professional Organizations; Chambers of Commerce; Vendors; Grantors/Funders/Bankers/ Lenders; Auditors; Insurance (Liability, Health, etc.) and others as needed].

| Level | Behavioral Examples |
|------------|---|
| 5-Expert | <ul style="list-style-type: none">Establish self as a trusted expert on health center finances and actively seek opportunities to lead trainings with the local Primary Care Association (PCA), National Professional Organization, etc. |
| 4-Skilled | <ul style="list-style-type: none">Participate in shaping training programs for the health center community at a local or national level, actively seek opportunities to knowledge share with peersIntroduce peers to vendors and vice versa to strengthen and promote ongoing professional relationships |
| 3-Applied | <ul style="list-style-type: none">Participate in local or national conferences to develop a deeper understanding of all available industry partners and engage in establishing those relationshipsSeek out people and resources that can help further the mission and financial resources of the health center; independently establish mutually beneficial professional relationships |
| 2-Basic | <ul style="list-style-type: none"><i>Understand how external relationships can be used to strategically further the mission of the health center</i><i>Actively seek out and engage in opportunities to participate in trainings or events that support relationship building external to the health center</i> |
| 1-Learning | <ul style="list-style-type: none"><i>Learning about current relationships and understanding where local and national resources exist</i> |

Strategic Relationships





PARTNERSHIPS

Skill: Guide clinical staff in learning about, and taking an active role in, community mobilization for health

| Level | Behavioral Examples |
|------------|--|
| 5-Expert | <ul style="list-style-type: none">• Create new and innovative approaches for mobilizing health services for the community• Demonstrate Skilled behaviors |
| 4-Skilled | <ul style="list-style-type: none">• Advocate for ongoing clinical excellence among all center sites and with other health center organizations• Demonstrate Applied behaviors |
| 3-Applied | <ul style="list-style-type: none">• Lead clinical staff in understanding the health center “value equation” (improved care/reduced costs) |
| 2-Basic | <ul style="list-style-type: none">• Understand the health center “value equation” (improved care/reduced costs) |
| 1-Learning | <ul style="list-style-type: none">• Aware of the role of the health center in providing health care services to the under-served population in the community |

Mobilization for Health





PARTNERSHIPS

Skill: Appropriately track and monitor all private donor contributions (individual/corporate/private foundation/other).

| Level | Behavioral Examples |
|------------|---|
| 5-Expert | <ul style="list-style-type: none">• Evaluate private donor grant opportunities for relevance to the health center strategic plan and recommend grants to pursue• Train and empower staff to monitor private donor contributions accurately and timely• Explore and identify additional private donor contribution sources with major stakeholders |
| 4-Skilled | <ul style="list-style-type: none">• Ensure tracking of private/donated funds is consistent with General Ledger (G/L) and balance sheet• Project utilization and need for private contributions/donations |
| 3-Applied | <ul style="list-style-type: none">• Develop reliable process for receiving and tracking all private donor funds• Distinguish between restricted and un-restricted private donor funds• Develop process for tracking disbursement of private/donated funds |
| 2-Basic | <ul style="list-style-type: none">• Monitor all private donor contributions on a monthly basis• Track all disbursements of private donor funds |
| 1-Learning | <ul style="list-style-type: none">• Becoming familiar with the sources of restricted and unrestricted private donor contributions• Understand General Ledger (G/L) postings for all private donor contributions |

Private Donors





PARTNERSHIPS

Skill: Continuously build knowledge and expertise through professional networks

| Level | Behavioral Examples |
|------------|---|
| 5-Expert | <ul style="list-style-type: none">• Take leadership role in Clinician Networks, Primary Care Associations (PCA) functions, and NACHC forums / projects• Demonstrate Skilled behaviors |
| 4-Skilled | <ul style="list-style-type: none">• Coach other members of the clinical team as to why it is important to continuously build knowledge/expertise through appropriate professional networks• Participate in an industry working groups as needed• Demonstrate Applied behavior |
| 3-Applied | <ul style="list-style-type: none">• Routinely participate in Clinician Networks and appropriate PCA and NACHC activities• Seek to expand my network of clinician contacts |
| 2-Basic | <ul style="list-style-type: none">• Understand PCAs, Clinician Networks, and NACHC, and their relationships• Have a small network of clinician contacts |
| 1-Learning | <ul style="list-style-type: none">• Aware of the existence of the state PCA, Clinician Networks, and NACHC, but have limited involvement in their activities or programs• Have not yet established a network of clinician contacts |

Professional Networks





PATIENTS

Skill: Facilitate positive and constructive interactions with and among staff, patients, and families (both individually and in groups)

| Level | Behavioral Examples |
|-----------|--|
| 5-Expert | <ul style="list-style-type: none">• Create innovative approaches for interacting with stakeholders in a manner that creates respect and positive responses• Demonstrate Skilled behaviors |
| 4-Skilled | <ul style="list-style-type: none">• Continuously earn respect from providers, other health center staff, patients, families, and communities• Successfully foster a fear-free environment in which creativity is actively encouraged and mistakes are openly permitted in pursuit of excellence• Demonstrate Applied behaviors |
| 3-Applied | <ul style="list-style-type: none">• Demonstrate “active listening” by summarizing, clarifying as needed, and appropriately reflecting the communications of others• Demonstrate open communication and desire for “win-win” solutions• Demonstrate the ability to give/receive constructive feedback in a positive, and respectful manner• Create a clinical environment in which innovation is valued and rewarded |
| 2-Basic | <ul style="list-style-type: none">• Understand basic communication theory (including concepts regarding semantics)• Understand how to treat staff, patients and family members with honesty and respect |

| | |
|------------|--|
| 1-Learning | <ul style="list-style-type: none">• Aware of the importance of creating positive and constructive interactions with everyone involved in the health center |
|------------|--|

Communication: Clinical Leaders





PATIENTS

Skill: Actively guide the clinical team toward patient self-management and true patient-centered, integrated care, wellness and health promotion

| Level | Behavioral Examples |
|-----------|--|
| 5-Expert | <ul style="list-style-type: none">• Advocate in the community for patient self-management and true whole-person care, wellness and health promotion<ul style="list-style-type: none">○ Speak at wellness events○ Write blogs for social media○ Write articles for community publications• Monitor the industry for innovative approaches to deliver patient-centered, integrated care and leverage patient self-management• Create processes/structure that my team can use for regularly identifying those patients who can best benefit from integrated care• Demonstrate Skilled behaviors |
| 4-Skilled | <ul style="list-style-type: none">• Have regularly scheduled team meetings and proactively ask team members to identify patients who need multi-disciplinary clinical support• Serve as active mentor/coach for clinical team members• Demonstrate Applied behaviors |
| 3-Applied | <ul style="list-style-type: none">• Guide active integration of related clinical disciplines (oral health, behavioral health, AIDS/HIV services, etc.) and applicable community resources to the full range of patient needs<ul style="list-style-type: none">○ Distribute materials in support of integrated care○ Schedule health center events to educate patients/stakeholders on the importance of self-management and integrated care |

| | |
|------------|--|
| | <ul style="list-style-type: none"> • Communicate to clinical team the benefits of integrated care <ul style="list-style-type: none"> ○ Clinical ○ Financial ○ Community ○ Health Center • Ensure each team member is an ambassador for self-management • Ensure my team works together to deliver whole-person care <ul style="list-style-type: none"> ○ Lead team meetings to discuss patients who need multi-disciplinary clinical support |
| 2-Basic | <ul style="list-style-type: none"> • Understand the implications that can occur with non-integrated care • Understand the benefits of self-management |
| 1-Learning | <ul style="list-style-type: none"> • Aware of the importance of self-management and integrated care, but have no experience implementing programs around them |

Patient Focus





PATIENTS

Skill: Demonstrate sensitivity to the culture, behaviors, and illness perspectives of the diverse populations served by the health center

| Level | Behavioral Examples |
|---------------|--|
| 5- Expert | <ul style="list-style-type: none">• Lead development of clinical programs that successfully address health disparities in diverse populations served• Create health education materials that accommodate the varying health literacy levels of patients and family members• Demonstrate Skilled behaviors |
| 4- Skilled | <ul style="list-style-type: none">• Positively facilitate staff diversity in all clinical roles, including outreach and community health workers• Facilitate culturally-sensitive collaborative relationships with both internal and external providers and groups• Effectively manage conflict arising from cultural issues• Demonstrate Applied behaviors |
| 3- Applied | <ul style="list-style-type: none">• Deliver a thorough assessment of quality-of-care perceptions of patients and families• Continually improve care of, and relationships with, diverse populations• Adapt health center clinical services to the languages, cultures, and preferences of patients and families• Establish ongoing rapport and positive working relationships with health center staff, patients, families, and community residents from diverse cultural and ethnic backgrounds• Provide health education and other appropriate written materials in a manner consistent with the communication style and health literacy levels of patients and family members |

| | |
|------------|---|
| | <ul style="list-style-type: none"> Communicate verbally with patients and family members in their preferred language and communication mode, either directly or through an interpreter |
| 2-Basic | <ul style="list-style-type: none"> Demonstrate, through self-awareness, a critical understanding of my own personal values relating to culture, ethnicity, and diversity |
| 1-Learning | <ul style="list-style-type: none"> Aware of the need to demonstrate cultural sensitivity (diverse cultures, differing cultural norms, and ethnic differences) |

Respect for Diversity





WORKFORCE

Skill: Help generate mutually beneficial partnerships and collaborations with internal team members and external stakeholders sharing common financial objectives.

| Level | Behavioral Examples |
|------------|--|
| 5-Expert | <ul style="list-style-type: none">• Establish and nurture mutually beneficial relationships between internal team members and external stakeholders to further the mission of the health center and create financial wins where they may not exist• Maintain awareness of communication dynamics between and external stakeholders and facilitate solutions when needed |
| 4-Skilled | <ul style="list-style-type: none">• Engage with internal team members to proactively identify relationships that will increase the financial health of the health center• Participate in internal team meetings and understand each unique financial barrier |
| 3-Applied | <ul style="list-style-type: none">• Selectively collaborate with external stakeholders to increase opportunity to engage them for future projects or business opportunities that will yield favorable financial results |
| 2-Basic | <ul style="list-style-type: none">• Understand where partnerships could exist, which stakeholders are needed to make progress towards the partnership; actively share information between the two |
| 1-Learning | <ul style="list-style-type: none">• Collaborate with internal partners, understand their business needs and objectives, and ask clarifying questions |

Collaboration





WORKFORCE

Skill: Guide the health center's credentialing/privileging activities

| Level | Behavioral Examples |
|------------|---|
| 5-Expert | <ul style="list-style-type: none">• Submit new ideas to credentialing bodies on how to streamline the credentialing process• Demonstrate Skilled behaviors |
| 4-Skilled | <ul style="list-style-type: none">• Guide ongoing improvements to the health center's program for credentialing/privileging• Demonstrate Applied behaviors |
| 3-Applied | <ul style="list-style-type: none">• Manage the full credentialing process for the center• Interact with Board of Directors on credentialing/privileging• Ensure that privileges are granted in a timely manner as appropriate• Assess and confirm the qualifications of a health care provider to provide services for the health center• Determine the capabilities of the practitioner to be able to perform the scope of services needed by the center• Make specific recommendations regarding appropriate individuals (e.g., potentially impaired providers)• Monitor the performance of the clinical staff to ensure that privileges should be maintained |
| 2-Basic | <ul style="list-style-type: none">• Understand both general principles of credentialing/privileging, and HRSA requirements on credentialing/privileging• Describe the various elements of credentialing and privileging processes and how they apply to the health center |
| 1-Learning | <ul style="list-style-type: none">• Aware of the importance of credentialing and privileging to managing the overall risk of the health center |

Credentialing/Privileging



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WORKFORCE

Skill: Advocate for genuine diversity and appropriate inclusion within the Board of Directors, staff, health center-related community groups and vendors.

| Level | Behavioral Examples |
|------------|---|
| 5-Expert | <p>Articulate a deep understanding of the need for diversity and inclusion that includes how the disparities emerged and practical, ethical ways the health center is obligated to address them</p> <p>Advocate for and take proactive steps to increase diversity in candidates for and composition of the health center staff, board, vendors and community partners</p> <p>Facilitate development of health center policies that support diversity and inclusion and the dissemination of information and training to support implementation</p> |
| 4-Skilled | <p>Articulate an understanding of why addressing diversity and inclusion concerns is important to the health center mission</p> <p>Lead implementation of policies related to diversity and inclusion</p> <p>Advocate for methods to continually improve policies and implementation related to diversity and inclusion</p> |
| 3-Applied | <p>Aware of disparities in diversity and inclusion and how the health center addresses them</p> <p>Consistently implement and support health center policies on diversity and inclusion</p> |
| 2-Basic | <p>Understand diversity is a concern for health center</p> <p>Demonstrate some understanding of why the disparities related to diversity exist, why they are important to address or what to do about them</p> |
| 1-Learning | <p>Aware of the diversity of staff and patients</p> |

Diversity, Equity and Inclusion



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WORKFORCE

Skill: Leverage Emotional Intelligence theory for the benefit of self and the clinical team

| Level | Behavioral Examples |
|------------|---|
| 5-Expert | <ul style="list-style-type: none">• Perceived internally and externally as expert in knowledge and routine application of Emotional Intelligence• Serve as an educational resource in regards to Emotional Intelligence for related external parties (individual and groups)• Demonstrate Skilled behaviors |
| 4-Skilled | <ul style="list-style-type: none">• Coach clinical team in effective use of Emotional Intelligence for the benefit of themselves and the organization• Demonstrate Applied behaviors |
| 3-Applied | <ul style="list-style-type: none">• Apply Emotional Intelligence theory in working with clinical team• Successfully employ social awareness, positive relationship management, and empathy• Demonstrate Basic behavior |
| 2-Basic | <ul style="list-style-type: none">• Know Emotional Intelligence theory• Able to apply Emotional Intelligence theory to self through self-awareness and self-management |
| 1-Learning | <ul style="list-style-type: none">• Aware of Emotional Intelligence, but lack significant knowledge of it |

Emotional Intelligence



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WORKFORCE

Skill: Strive for understanding and actualization of joy in practice, both personally and for the clinical team

| Level | Behavioral Examples |
|------------|--|
| 5-Expert | <ul style="list-style-type: none">• Seen as mentor to staff and others in successful promotion of ongoing joy in work and resilience• Demonstrate Skilled behaviors |
| 4-Skilled | <ul style="list-style-type: none">• Coach staff in ability to identify specific instances of lack of joy in work• Guide staff in knowing how to promote joy in work• Coach staff in stress tolerance and resilience skills• Demonstrate Applied behaviors |
| 3-Applied | <ul style="list-style-type: none">• Able to identify symptoms of lack of joy in work, and lack of resilience, in both self and staff• Can successfully intervene in instances of lack of joy in work• Demonstrate Basic behaviors |
| 2-Basic | <ul style="list-style-type: none">• Understand fundamental dimensions of stress tolerance and resilience• Know symptoms of lack of joy in work, in self and others |
| 1-Learning | <ul style="list-style-type: none">• Generally aware that lack of joy in work is a potentially serious problem, but not knowledgeable about how to prevent/identify/address instances of it |

Joy in Work





WORKFORCE

Create and model a positive, collaborative, and fear-free organizational culture.

| Level | Behavioral Examples |
|------------|--|
| 5-Expert | <ul style="list-style-type: none">• Continually model open communication and genuine collaboration• Continually model a leadership style that eliminates fear in the workplace• Mentor others, internally and externally, in development of a positive, collaborative, and fear-free culture• Demonstrate Skilled behaviors |
| 4-Skilled | <ul style="list-style-type: none">• Guide staff in maintaining positive and truly collaborative relationships in daily work• Coach staff at all levels in techniques to drive out fear in organizational transactions and decision-making• Demonstrate Applied behaviors |
| 3-Applied | <ul style="list-style-type: none">• Successfully create and promote strongly collaborative relationships among all Board and staff members• Succeed in driving out fear from ongoing organizational transactions and decision-making• Demonstrate Basic behaviors |
| 2-Basic | <ul style="list-style-type: none">• Understand how to develop and maintain a truly positive and collaborative culture within the health center• Know how to implement a fear-free culture |
| 1-Learning | <ul style="list-style-type: none">• Aware of the need for a collaborative and fear-free organizational culture |

Organizational Culture





WORKFORCE

Skill: Effectively carry out all relevant health center personnel management functions

| Level | Behavioral Examples |
|-----------|--|
| 5-Expert | <ul style="list-style-type: none">• Craft a clinical staffing plan for the health center to fulfill objectives• Create a structured template and a series of questions for conducting interviews for key clinical positions in the health center• Develop innovative retention approaches to create a rewarding and fulfilling work environment• Demonstrate Skilled behaviors |
| 4-Skilled | <ul style="list-style-type: none">• Coach others on how to conduct performance reviews, and how to recruit the best employees and keep them on board• Demonstrate Applied behaviors |
| 3-Applied | <ul style="list-style-type: none">• Conduct real-time coaching/mentoring when I see an opportunity for it• Provide coaching and feedback in a timely, candid, and respectful fashion• Conduct performance reviews• Recognize the effort of individuals and celebrate excellence when observed• Use a variety of methods to attract qualified talent<ul style="list-style-type: none">○ LinkedIn/social media○ Employee/manager referrals○ Professional societies/associations○ Community outreach• Execute recruiting and retention strategies |
| 2-Basic | <ul style="list-style-type: none">• Understand personnel management fundamentals (managing direct reports, performance evaluation, progressive discipline, etc.) |

| | |
|------------|---|
| | <ul style="list-style-type: none"> • Can execute effective recruiting and retention strategies with assistance from others |
| 1-Learning | <ul style="list-style-type: none"> • Aware of the responsibilities for effective personnel management in the health center, but have limited to no experience in managing other people |

Personnel Management





WORKFORCE

Skill: Seek out engagement in local, state, national and international opportunities for professional development and health center movement advocacy.

| Level | Behavioral Examples |
|------------|---|
| 5-Expert | <ul style="list-style-type: none">• Active with local and state governance• Advocate for role of health center as a community partner and provider of healthcare• Write and present position/white papers advocating for health center services and mission |
| 4-Skilled | <ul style="list-style-type: none">• Actively participate in local community groups, including community relations councils, neighborhood/community-based associations, local school boards, cultural organizations• Take opportunities to develop community partnerships to support delivery of health outreach projects• Encourage team members to engage in local, state, national and international professional development opportunities |
| 3-Applied | <ul style="list-style-type: none">• Develop local partnerships to assist in advocacy endeavors• Known to be a reliable source of information and advice |
| 2-Basic | <ul style="list-style-type: none">• Contribute to initiatives that help patients become the best advocates for their own healthcare• Monitor state political activities |
| 1-Learning | <ul style="list-style-type: none">• Understand health center mission and vision and how they integrate with and support the community• Attend city hall and other community meetings occasionally |

Professional Development



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WORKFORCE

Skill: Actively advocate for appropriate provider compensation

| Level | Behavioral Examples |
|------------|--|
| 5-Expert | <ul style="list-style-type: none">• Work with the senior management team to create new and innovative ways to improve compensation for the center and providers that incorporates:<ul style="list-style-type: none">○ Risk based contracts○ Care and case management incentives○ Shared savings○ Capitation• Demonstrate Skilled behaviors |
| 4-Skilled | <ul style="list-style-type: none">• Work with other senior managers in the development and implementation of alternate provider performance compensation programs that include productivity, quality, and other organizational priorities, to improve provider recruitment and retention and strengthen the organizations financial stability• Demonstrate Applied behaviors |
| 3-Applied | <ul style="list-style-type: none">• Responsible for, or work with other senior managers, to oversee the implementation and modification of the provider compensation system• Work with provider staff to ensure their input to and understanding of the compensation plan |
| 2-Basic | <ul style="list-style-type: none">• Understand fundamental provider compensation models and their importance in promoting recruitment and retention and avoiding compensation inequity among providers |
| 1-Learning | <ul style="list-style-type: none">• Aware of provider compensation models |

Provider Compensation



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WORKFORCE

Skill: Working with other C-Suite health center officials as appropriate, ensure development and implementation of a successful provider recruitment/ retention program

| Level | Behavioral Examples |
|-----------|---|
| 5-Expert | <ul style="list-style-type: none">• Working with other C-Suite health center officials as appropriate, ensure development and implementation of a successful provider recruitment/retention program<ul style="list-style-type: none">○ Risk based contracting○ Care and case management incentives Shared savings○ Capitation• Demonstrate Skilled behaviors |
| 4-Skilled | <ul style="list-style-type: none">• Work with senior managers (especially the CMO and COO} to investigate alternative provider performance compensation programs addressing productivity, quality, and other organizational priorities, to improve recruitment/retention and strengthen the center's financial stability• Coach others on how to develop and implement a successful provider recruitment/retention program• Demonstrate Applied behaviors |
| 3-Applied | <ul style="list-style-type: none">• Working with senior managers (especially the CMO and COO}, ensure effective provider recruitment and retention programs, to include effective hiring mechanisms, on boarding systems, and compensation models• Work with provider staff to ensure their input to, and understanding of, all provider recruitment/retention programs at the center• Demonstrate Basic behaviors |
| 2-Basic | <ul style="list-style-type: none">• Understand fundamental provider recruitment/retention issues, including recruiting/hiring, onboarding, and |

| | |
|------------|--|
| | appropriate compensation (with attention to avoiding compensation inequity among providers} |
| 1-Learning | <ul style="list-style-type: none"> Aware of the need for effective provider recruitment and retention strategies, including appropriate compensation models |

Provider Recruitment





WORKFORCE

Skill: Inspire and motivate all Board and staff members - regardless of background or demographics - to pursue ongoing excellence in furtherance of the center's mission

| Level | Behavioral Examples |
|------------|--|
| 5-Expert | <ul style="list-style-type: none">• Generally perceived both internally and externally as a truly inspirational and motivational leader• Continuously seek creative and innovative ways to inspire and motivate others• Demonstrate Skilled behaviors |
| 4-Skilled | <ul style="list-style-type: none">• Coach others on how to inspire and motivate• Guide others in how to pursue true excellence• Use recognized personality assessment tools and leadership style assessments to optimize leadership effectiveness<ul style="list-style-type: none">○ Myers-Briggs Type Indicator○ DISC analysis• Continually seek personal growth opportunities to enhance CEO role• Work positively with a multi-generational workforce, mitigating generational differences• Demonstrate Applied behaviors |
| 3-Applied | <ul style="list-style-type: none">• Consider the inspiration of staff to be a critical job component• Continuously motivate Board and staff to achieve true clinical and administrative excellence• Demonstrate Basic behaviors |
| 2-Basic | <ul style="list-style-type: none">• Know basic Leadership principles and styles• Describe how Leadership differs from Management• Can describe what "inspiration and motivation" entail• Know what "excellence" involves |
| 1-Learning | <ul style="list-style-type: none">• Aware of necessity for a leader to inspire and motivate |

Pursuit of Excellence



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WORKFORCE

Skill: Maintain strong, positive and mutually supportive relationships with the health center's Board of Directors, leadership and staff.

| Level | Behavioral Examples |
|------------|---|
| 5-Expert | <ul style="list-style-type: none">• Communicate with all stakeholders with a clear understanding of who they are and what they want and need to know to improve the overall financial performance of the health center• Establish self as a trusted financial leader using innovative approaches to deepen the leadership and Board's understanding of health center finances and their roles in supporting its financial health• Proactively engage health center leadership and Board Board appropriately in identifying solutions to support financial goals and outcomes of the health center |
| 4-Skilled | <ul style="list-style-type: none">• Lead the development and presentation of financial reports and information for the health center leadership and the Board• Manage health center leadership and Board expectations for financial performance |
| 3-Applied | <ul style="list-style-type: none">• Contribute to the development of financial reports and presentations tailored to the information and learning needs of the health center leadership and Board |
| 2-Basic | <ul style="list-style-type: none">• Understand the key functions of the health center departments and the Board and to identify what they want and need to know about health center finances |
| 1-Learning | Learning the general and fiduciary functions of the Board and roles and accountabilities of the various health center departments |

Relationship-Building





WORKFORCE

Skill: Proactively and continually assess personal strengths/challenges and manage learning and guidance needs (for example, participate in structured self-assessments and education; seek feedback and guidance and lifelong learning, etc.).

| Level | Behavioral Examples |
|-----------|--|
| 5-Expert | <ul style="list-style-type: none">• Practice informed reflection and action based upon the major changes that will occur in the next 10, 20 or more years ("Future Think")• Engage with and nurture relationships with peers/partners/ candidly provide transparent and forthcoming feedback and advice to help with self-assessment and development• Identify the behavioral modifications and strategies necessary improvement |
| 4-Skilled | <ul style="list-style-type: none">• Subscribe to and read industry publications, including those in other delivery models• Complete self-assessments of my plans and progress towards my and professional goals on a regular basis |
| 3-Applied | <ul style="list-style-type: none">• Develop and adhere to self-directed professional development plan associations• Willing to explore options outside of my comfort zone• Seek out the advice and counsel of my peers and leadership team |
| 2-Basic | <ul style="list-style-type: none">• Take part in personal development opportunities presented by entities• Develop plans (including time frames) to achieve personal development goals• Ensure that my personal goals are included in annual performance planning |

Self-Assessment and Growth



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WORKFORCE

Skill: Lead and/or participate in collaborative group projects with good outcomes.

| Level | Behavioral Examples |
|------------|---|
| 5-Expert | <ul style="list-style-type: none">• Develop forward-thinking strategies for the health center• Forecast needs for programmatic enhancements for future growth based on the mission statement• Engage ALL appropriate stakeholders, internal and external |
| 4-Skilled | <ul style="list-style-type: none">• Contribute knowledge of current industry trends• Perceived as an informed, fact-based source of information and guidance• Contribute knowledge gained through networking with external organizations and experts |
| 3-Applied | <ul style="list-style-type: none">• Possess/seek a well-rounded/circumspect understanding of subject matter and seek to understand the basis or foundation for different perspectives represented in the group• Manage and establish measures for effective group process and goal-oriented outcomes• Identify appropriate health center team members/representatives for effective group work and outcomes |
| 2-Basic | <ul style="list-style-type: none">• Learning workflow of other departments• Describe the current operational budget for each department and rationale |
| 1-Learning | <ul style="list-style-type: none">• Understand department roles in the health center• Understand department impacts to the center's fiscal viability |

Teamwork



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WORKFORCE

Skill: Identify learning needs and advocate for training and technical support to properly implement financial policies and procedures; continuously educate executives/management and empower them to inform, train, and support all staff members.

| Level | Behavioral Examples |
|------------|--|
| 5-Expert | <ul style="list-style-type: none"> • Work with health center executives to identify and understand the key metrics/indicators that drive financial success for the health center and their roles in training and supporting their respective teams • Communicate throughout the health center the relationship of everyone's role in properly implementing financial policies and procedures • Advocate for new and effective training and resources to assist health center leaders in properly implementing financial policies and procedures |
| 4-Skilled | <ul style="list-style-type: none"> • Assess, educate and coach finance team members to improve their understanding and implementation of health center metrics/indicators and the factors influencing their movement • Contribute to the ongoing improvement of available training and resources |
| 3-Applied | <ul style="list-style-type: none"> • Articulate factors that influence the movement of key metrics/indicators and the financial impacts and the implications of their role in those processes • Understand and implement the health center finance policies and procedures • Routinely access health center training and support resources to effectively and efficiently implement financial policies and procedures |
| 2-Basic | <ul style="list-style-type: none"> • Aware of many of the training and resources available • Seek advice/guidance for accessing health center training and support to improve understanding and implementation of specific financial policies and procedures |
| 1-Learning | <ul style="list-style-type: none"> • Aware of health center finance policies and procedures and where to find them • Receive guidance and coaching on accessing learning resources |
| | <ul style="list-style-type: none"> • Have completed a self-assessment to establish my baseline performance levels/current status • Engage my Chief Executive Officer (CEO) and peers in constructive dialogue about my personal and professional goals |





WORKFORCE

Skill: Motivate staff and Board to adopt and pursue a transformational mindset

| Level | Behavioral Examples |
|------------|--|
| 5-Expert | <ul style="list-style-type: none">Continuously pursue opportunities for "creative disruption", for the long-term benefit of the center and its patientsDemonstrate Skilled behaviors |
| 4-Skilled | <ul style="list-style-type: none">Motivate Board and staff to sustain successful organizational changeGuide Board and staff in maintaining positive changes and their resultsDemonstrate Applied behaviors |
| 3-Applied | <ul style="list-style-type: none">Lead health center successfully through needed transformational changeDemonstrate Basic behaviors |
| 2-Basic | <ul style="list-style-type: none">Know issues and dynamics involved in successful organizational transformationUnderstand organizational transformation theory |
| 1-Learning | <ul style="list-style-type: none">Aware of the need for organizational transformation in the current health care environment |

Transformational Mindset



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WORKFORCE

Skill: Constantly demonstrate unconditional respect for all staff, Board members, patients, families, and community residents

| Level | Behavioral Examples |
|------------|--|
| 5-Expert | <ul style="list-style-type: none">Continuously model unconditional respect for allCreate an environment in which treating people with respect is recognized as a critical component of the health center's value systemDemonstrate Skilled behaviors |
| 4-Skilled | <ul style="list-style-type: none">Coach Board and staff in the need for deep respect and trust in relationships with stakeholdersMotivate Board and staff to create and maintain deeply respectful relationshipsDemonstrate Applied behaviors |
| 3-Applied | <ul style="list-style-type: none">Successfully create strong relationships based on unconditional respect for othersThrough a stance of genuine respect, generate ongoing trust in relationshipsDemonstrate Basic behaviors |
| 2-Basic | <ul style="list-style-type: none">Know how to generate trust and respect in relationships with internal and external stakeholdersKnow techniques for effective relationship building |
| 1-Learning | <ul style="list-style-type: none">Aware of the leadership mandate to develop overtly respectful relationships with all stakeholders |

Unconditional Respect





WORKFORCE

Skill: Maintain work-life balance and personal health.

| Level | Behavioral Examples |
|-----------|--|
| 5-Expert | <ul style="list-style-type: none">• Exemplify and inspire others to achieve work-life balance• Have confidence that the department is empowered for and capable of functioning optimally in my absence• Engage the health center in local community and government festivals, charitable causes, sporting events and other activities• Exercise a flexible work schedule responsibly• Understand how to manage situational stress effectively |
| 4-Skilled | <ul style="list-style-type: none">• Involved personally in local community and government festivals, causes, sporting events and other activities• Practice effective time management techniques• Engage in strong personal interests outside of work |
| 3-Applied | <ul style="list-style-type: none">• Engage in strategies to manage stress and enhance creativity and effectiveness throughout the day (for example, mini breaks out of the office, refrain from eating lunch at desk, creative thinking/imagination)• Volunteer to mentor and support individuals in the community (for example, tutoring, meals on wheels, Boys and Girls Clubs, YMCA, Big Brothers/Sisters, Scouts, school programs, etc.)• Take time for self on a regular basis, for example: annual vacations, pampering, family time, etc.• Support work/life balance for staff members |

Work-Life Balance



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