

# Chief Operating Officer Competencies and Professional Development Tool

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## BACKGROUND

Defining health center Chief Operating Officer (COO) Competencies is a project led by NACHC engaging health center leaders from across the country to identify a comprehensive set of COO work role domains, tasks/skills, and behaviors. This working group is creating a *taxonomy of competencies* to serve as a foundation for defining the important aspects of COO leadership and effectiveness. In healthcare and related industries, many organizations have published frameworks to evaluate competency and support professional development (e.g., Medical Group Management Association (MGMA), National Institutes of Health (NIH), Healthcare Financial Management Association (HFMA), etc.). For our purposes, the American College of Healthcare Executives (ACHE) Competencies (2023) was selected and serves as a common foundation for all health center executives. The ACHE domains have been adapted to represent the environment and mission of health centers and specifically the role of the COO. This tool is organic and subject to continuous quality improvement and revision as COO practice evolves and feedback on the tool is gathered, analyzed, and incorporated.

## RECOMMENDED USES

This tool is appropriate for use by a wide variety of stakeholders, including health center Chief Executive Officers (CEO), COOs and other Leaders; Board of Directors; Human Resources; Search Firms; Primary Care Associations; Training Organizations; and more. It is our hope that this tool will provide the structure and common language to help define, develop, and sustain excellence in operations leadership of health centers across the United States.

As a comprehensive tool, the adoption of the *entire* document as the *standard of performance* for the operations leadership of all health centers is not appropriate or advised. Competence is *situationally bound*; therefore, each health center presents a unique set of challenges and opportunities that the COO is required to master to achieve a high level of performance. Recommended uses for this tool include:

- comprehensive taxonomy of COO competencies from which the health center leadership team may identify the specific domains, tasks/skills and behaviors needed for the operations leadership of the health center
- self-assessment tool for existing and aspiring COOs to identify their overall levels of competency and point them towards areas needing development to help them achieve their personal and professional career objectives
- reference tool for CEOs to engage operations leaders in structured conversations about their professional strengths and learning needs and support the development of a personalized professional development plan
- comprehensive resource from which health center relevant position descriptions and interview questions for COO candidates may be derived
- compendium of roles and responsibilities to guide search firm criteria for COO candidates
- resource for constructing health center relevant performance review criteria for existing COOs
- tool for the development of relevant training/learning experiences and resources for COOs

Conversely, this tool should *not* be used in the following ways:

- in its entirety to define the role and expectations of the COO in a health center - using the document in this way may create unreasonable expectations for performance that are not aligned with the needs of the individual health center
- as a tool/justification to discharge a current operations leader or disqualify a candidate; or
- as a yardstick from which to measure the overall operations performance of a health center

**DISCLAIMER:** Be aware that this tool is subject to continuous improvement and will change over time based on national and global events impacting health centers and implementation feedback.

## DEFINITIONS

*The Chief Operating Officer (COO)* is a key member of the health center management team whose primary concern is the execution of the strategic plan and facilitating optimal organizational performance. This role requires a broad knowledge of many disciplines, relationship management and the ability to plan, prioritize and manage the successful execution of varied tasks. Of all the C-Suite roles, the COO role is the most tailored to organizational needs, often taking on roles and responsibilities that fill the specific long and short-term leadership gaps of the health center. The COO:

- creates and assures continued value for the organization's stakeholders which include patients, employees, and the community.
- efficiently and effectively leads the development, delivery, assessment, and improvement of the systems and processes that support the delivery of health care service.
- leads the operational, strategic, and mission-oriented objectives of the health center that include improving access to healthcare services and positively impacting the health status of the medically underserved, vulnerable and neediest populations and geographic areas.

*Domains:* The major functional roles or areas of competence for which the COO is responsible/accountable. Eleven domains have been identified that are relevant to the major functions of the health center COO.

*Tasks/Skills:* The major responsibilities that comprise each of the Domains.

*Behavioral Examples:* The observable actions that define each of the five levels of competence for each task/skill (under development).

*Levels of Competence:* The levels of competence used in this tool are loosely based on the seminal work of Dreyfus & Dreyfus<sup>1</sup>. COOs are encouraged to strive to attain, *at minimum*, "Level 3 – Competent" status for skills that are relevant and necessary for excellence in operations leadership of their health center.

1. Dreyfus, S. E. 2004. The Five-Stage Model of Adult Skill Acquisition. Bulletin of Science Technology & Society, 24: 177 <http://www.bumc.bu.edu/facdev-medicine/files/2012/03/Dreyfus-skill-level.pdf>

# NOVICE TO EXPERT COMPETENCY LEVELS

LEVELS	DESCRIPTION
 <p>5 Expert</p>	<p>Performance at the Expert level of expertise demonstrates an enormous experiential background that enables assessment and response to situations by efficiently zeroing in on the most important aspects of and identifying the best courses of action.</p> <p><b>Key Descriptors:</b> Innovative, intuitive, national/world perspective; focus on trends, strategy, external partnerships and enhancing knowledge &amp; insight of internal and external colleagues and constituents</p>
 <p>4 Proficient</p>	<p>Performance at the Proficient level of expertise demonstrates a significant amount of experience. Sees situations holistically and understands intuitively the interdependence, priority, and importance of various aspects of the situation.</p> <p><b>Key Descriptors:</b> Proactive &amp; efficient; focus on facility-wide performance and professional affiliations</p>
 <p>3 Competent</p>	<p>Performance at the Competent level of expertise shows enough experience to be able to complete most tasks independently, see the larger context and attend to multiple aspects of situations, but may also become overwhelmed by them at times.</p> <p><b>Key Descriptors:</b> Reliable &amp; independent; focus on department operations and applying and enhancing knowledge and skills</p>
 <p>2 Advanced Beginner</p>	<p>Performance at the Advanced Beginner level of expertise demonstrates some experience in some situations and is at the initial stages of considering and understanding the various aspects or complexities of those situations.</p> <p><b>Key Descriptors:</b> Partially independent; Focus on understanding role &amp; learning relevant information</p>
 <p>1 Novice</p>	<p>Performance at the novice level of expertise may demonstrate “book” knowledge of many domains and skills but with relatively little experiential knowledge.</p> <p><b>Key Descriptors:</b> Reliance on rules, needs ongoing supervision/coaching/training; focus on general skill and knowledge development</p>

# HEALTH CENTER CHIEF OPERATING OFFICER

## COMPETENCY DOMAINS, SKILLS/TASKS SUMMARY

ACHE 2023 Healthcare Executive Competencies Adapted for Health Center COOs\*

### I. COMMUNICATION AND RELATIONSHIP MANAGEMENT

Communicating clearly and concisely with key internal and external customers/stakeholders, establishing and maintaining collaborative relationships, and facilitating constructive interactions with individuals, groups, and organizations. Skills/Tasks include:

1. Demonstrate clear, effective, and efficient communications, including the use of effective listening skills and constructive feedback; prepare reports/documents and utilize communication strategies and media to promote stakeholder understanding; and plan and conduct impactful and productive business meetings.
2. Strategically develop mutually beneficial relationships and partnerships with current and potential external health center stakeholders.
3. Develop collegial, mutually beneficial and strategic relationships and collaborations with internal health center stakeholders.
4. Manage relationships effectively, with integrity, honesty, and emotional intelligence; facilitate the resolution of communication and performance disruptions and conflict proactively and in alignment with health center policies.

### II. LEADERSHIP

Inspiring individual and organizational excellence, creating a shared vision and successfully managing change to attain the organization's strategic ends and successful performance. Includes managing resources and leading the health center effectively and ethically; understanding stakeholder needs and priorities, the health care environment, the power of diversity and inclusiveness, and the unique dynamics of the health center model. Also includes skills and tasks associated with organizational dynamics and governance and overall organizational leadership, development, and effectiveness. Skills/Tasks include:

1. Model appropriate behaviors and expect others to adhere to all health center policies, procedures, regulations, and laws (moral leadership).
2. Advocate for the health center mission, values, and culture internally and externally; identify/cultivate opportunities through active participation in industry networks.
3. Advocate for genuine diversity and appropriate inclusion within the Board of Directors, staff, health center-related community groups and vendors.
4. Model and promote sensitivity to diverse cultures, behaviors and illness perspectives of patients, families, and health center staff, and advocate for health equity.

## HEALTH CENTER CHIEF OPERATING OFFICER **COMPETENCY DOMAINS, SKILLS/TASKS SUMMARY**

5. As a member of the Executive team, lead the development and alignment of the operational components of the health center's strategic plan and review activities; set direction, strategize around opportunities and threats and review goals, objectives, and outcomes on an organization-wide, ongoing basis.
6. Maintain strong, positive, and mutually supportive relationships with the health center's Board of Directors, leadership, and staff.
7. Identify learning needs and advocate for training and technical support to properly implement operational policies and procedures; continuously educate executives/ management and empower them to inform, train and support all staff members.
8. Maintain and utilize knowledge of the unique dynamics of the health center model, current trends, and information in health care regulations, compliance, and best practices and their impacts on the effectiveness of the organization's operations and the Chief Operating Officer (COO) role in decision-making and information sharing.

### **III. PROFESSIONALISM**

Aligning personal and organizational conduct with ethical and professional standards that include a responsibility to the patient and community, a service orientation, and a commitment to lifelong learning and improvement. Also applying knowledge, sensitivity and judgment to act effectively and with personal integrity in accordance with the fundamental principles of professional and personal ethical behavior; and effectively managing self and resources to achieve the health center mission and objectives. Skills/Tasks include:

1. Demonstrate commitment to the highest standards of ethical responsibility, credibility, objectivity, accountability, and trustworthiness.
2. 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.).
3. Participate in local, state, national and international opportunities for professional development, networking, and health center movement advocacy.
4. Maintain work-life harmony and personal health.

The ACHE groups several domains into a subcategory known as **Business Skills and Knowledge**, the ability to apply business principles, including systems thinking, to the healthcare environment. Following are the relevant domains for the health center COO.

**IV. OPERATIONS MANAGEMENT**

Planning, developing, organizing, and managing systematic processes to achieve and maintain the highest levels of health center performance, including efficiency, effectiveness, efficacy, and overall quality. Oversees the development and implementation of staffing plans; patient care throughput, quality, and outcomes management; and the utilization of supplies, equipment, and facilities while assuring alignment with the health center's mission, values, financial and programmatic goals, accreditation [e.g., Federal Tort Claims Act (FTCA), Operational Site Visits (OSV)], and regulatory and legal requirements. Skills/Tasks include:

1. Ensure the development, integration, effective management, and sustainability of accurate and efficient systems, policies and procedures for the health center's operational functions (for example, clinical operations; clinical quality; risk, compliance, and regulatory management; strategic and annual planning; operations reporting and management; decision support for financial and community health outcomes; etc.)
2. Work collaboratively with providers and clinical leaders to ensure the efficient and effective daily operations of the clinical practices including staffing, patient management/ throughput, policies and procedures, scheduling, labs, specialty practices and referrals, etc.
3. Collaborate with executive leadership to identify ways to support the health center's mission, vision, values, and goals through effective talent management, including recruiting, hiring and retention strategies, succession planning, career laddering, orientation/onboarding, training/ mentoring, professional development, and performance/ competency assessment and recognition.
4. Ensure compliance with employment, benefits, insurance, safety, and other employment laws, regulations, and requirements; and the development and implementation of policies and procedures to ensure ongoing compliance.
5. Ensure cost-effective purchase/leasing, utilization, maintenance, and storage of equipment, supplies, and facilities; establishes efficient systems for requests, approvals, inventory and maintenance.
6. Work collaboratively with senior leaders, department/functional leaders, providers, clinical and non-clinical staff to establish productive and collegial working relations, reduce conflict, and develop and implement policies and resources to increase job satisfaction and tenure and reduce turnover.
7. Oversee establishment of an environment of care/culture of safety (e.g., patient safety, engagement and satisfaction assessment, goal setting and plans for improvement).
8. Plan, organize, and evaluate various projects, programs and services involving diverse administrative operations; oversee or manage specific projects, programs and/or services, such as Federally Qualified Health Center (FQHC) requirements.
9. Develop and implement comprehensive business continuity strategies and plans to effectively prepare, respond to, and recover from disruptions or disasters.



## **V. GRANTS MANAGEMENT**

Managing public and private funder relationships, planning and operational tasks associated with grant applications and management of grant funds and other resources; applying efficient and effective strategies to maximize grant impact and achievement of the grant goals. Includes effective interpersonal and relationship management skills while interacting with public and private grant organizations and funders; and working closely with the health center finance team to ensure compliance with all applicable public and private grant requirements and regulations. Skills/Tasks include:

1. Facilitate the identification/creation of grant funding opportunities to support the health center programs and operations and oversee development of grant applications, submissions and tracking of awards.
2. Collaborate with finance team and department/clinic leaders regularly to ensure that budgets are accurate and up to date.
3. Appropriately manage all private donor activity, including proposal development, tracking and monitoring and communications (individual/corporate/private foundation/other).
4. Communicate status and progress of grant-related activities with grantors/funders and stakeholders in an accurate and engaging manner.

## **VI. BUSINESS DEVELOPMENT**

Facilitating successful stakeholder engagement, planning, funding, development, implementation and/or ongoing management of strategic or urgent projects or programs while meeting time, budget, health care outcome goals, regulatory and grant requirements. Includes utilizing successful strategies for navigation through both internal and external organizational challenges and politics to achieve the desired programmatic, financial and community health outcomes. Skills/Tasks include:

1. Establish, maintain, and evaluate health center readiness for business development including the maintenance of accurate and efficient operations; includes cultivation of mutually beneficial partnerships/engagements with local community organizations, vendors and other business partners; and maintaining current knowledge of the health care industry.
2. Lead the creation and management of business development and project plans that comprehensively and strategically target: the development and implementation of new and innovative programming; the improvement or expansion of existing programs, products, and services, locations/access points; and/or utilization of public & private innovation and technology grant funding opportunities aligned with the federally qualified health center mission and strategic plan.
3. Acquire and maintain external and internal business intelligence through market-based / competitor analysis of local, regional, and national healthcare trends (including services and payment), competitive threats, expansion opportunities and internal performance trends and strengths & challenges; and deliver data-driven analyses to support actionable strategic direction of the health center.

## HEALTH CENTER CHIEF OPERATING OFFICER **COMPETENCY DOMAINS, SKILLS/TASKS SUMMARY**

4. Implement strategies to help ensure operating goals are met, including marketing, advertising and management of productivity, utilization, revenue, satisfaction, etc.; ensure the new or revamped programs or services are integrated into the ongoing operations of the health center and are sustainable.
5. Assure adherence to the health center ethical code and all applicable federal, state, and local laws, regulations, and generally accepted standards of conduct in the development of new business opportunities for the health center.

### **VII. HUMAN RESOURCE MANAGEMENT**

Facilitating the development of knowledge, attitudes, skills, and behaviors necessary for team members to function together with a high degree of engagement and satisfaction within the department and the health center and at the highest possible levels of effective performance, team growth, development & engagement. Skills/Tasks include:

1. Oversee the determination of staffing requirements and patterns to support the strategic plans and programmatic goals of the health center.
2. Ensure the alignment of health center policies and procedures with labor and human resource (HR) laws and regulations.
3. Hire, orient, retain, develop, manage, and ensure effective leadership of high-performing team members.
4. Optimize operations team and individual performance in service to the health center and its mission (for example, manage expectations; provide timely feedback and recognition; ensure individuals have the knowledge, skills, mindset, and support needed, etc.).
5. Mentor key members of the leadership team to build strong leaders for the future (includes succession planning).
6. Model and create a work environment where staff members demonstrate unconditional respect, collaboration, and kindness within the health center (includes all staff, Board of Directors, patients, families, and community residents).
7. Model and coach team members to develop self-awareness, knowledge, sensitivity, respect, and active support of diversity in the workforce.
8. Facilitate self and team knowledge and utilization of Emotional Intelligence and other effective strategies and concepts to improve interpersonal communications and effectiveness.
9. Effectively manage change and engage the team by leading with a transformational mindset, disciplined agile mindset, and/or other effective change management constructs and best practices.
10. Model and facilitate the leadership team's understanding and implementation of appropriate self-care/work-life harmony (for example, demonstrate knowledge of the causes and effects of the lack of self-care, identify instances of lack of successful self-care, offer effective self-care improvement and maintenance strategies, etc.).

## **VIII. STRATEGIC PLANNING, MARKETING, AND COMMUNICATIONS**

Strategically assessing and evaluating courses of action, identifying imaginative opportunities to improve performance and position, and implementing innovative and cost-effective solutions leading to effective change management and business process improvement. Working closely with C-suite and service line leaders, facilitate the development, execution, and monitoring of the health center annual and strategic operating plans; and data-informed, efficient, and effective communication of programs, services, goals and progress among the leadership team and throughout the health center. Skills/Tasks include:

1. Demonstrate business acumen and creativity in strategic operations and project planning, utilizing data to determine strategic growth/innovation opportunities (both internally and externally).
2. Assist in identifying potential opportunities for growth and development; integrate business development goals and objectives into the overall health center strategic plan.
3. Lead the development, communication and monitoring of the health center strategic and operating plans and appropriately engage interdepartmental and interdisciplinary participation when indicated.
4. Adopt and apply innovative methods and technologies to implement strategy and manage change.
5. Utilize sound decision-making in the execution of strategic and operational objectives.
6. Develop and disseminate market-informed education and information to increase community awareness and utilization of health center services and the health center's "Employer of Choice" (EOC) status; ensure health center staff are informed and educated about introducing new services and programs.

## **IX. INFORMATION MANAGEMENT**

Using secure technology to ensure that health information is confidential, available when and where it is needed, and contributes to safer, higher quality, more coordinated, more efficient, and less costly care for everyone, and leveraging technology to optimize business processes across the health center enterprise. *Note: This domain is especially appropriate for COOs to whom IT reports or who are responsible for the IT function.* Skills/Tasks include:

1. In collaboration with the IT department, lead the evaluation, selection, and implementation of technology and software that will optimize the patient and employee experience.
2. Facilitate the integration of technology to optimize health center operations.
3. Lead and participate in Security Risk Assessments.
4. Assist in developing the departmental strategic plan for information management (using the organization's overall strategic plan as a starting point).
5. Serve as a champion for the utilization of effective technologies.
6. Ensure interoperability between/among technologies to optimize organizational effectiveness and efficiency.
7. Ensure that IT infrastructure and staffing optimally support health center operations.

## HEALTH CENTER CHIEF OPERATING OFFICER **COMPETENCY DOMAINS, SKILLS/TASKS SUMMARY**

8. Develop strategy to ensure compliance with regulatory bodies and health center directives, policies and procedures.
9. Collaborate with key stakeholders to develop and implement emergency response and business continuity plans.
10. Facilitate the execution of the telehealth program.
11. Promote the adoption of a health information and data management culture to acquire, create, organize, distribute, and marshal IT information, resources, and capabilities effectively.

### **X. RISK MANAGEMENT, CORPORATE COMPLIANCE, AND ETHICS**

Designing and implementing policies and systematic internal audit and control processes to identify, assess, manage, and mitigate threats or risks to the health center's ongoing operations and overall safety and security; lead risk assessments, claims management, and ensure reporting is accurate and efficient; and assure compliance with all applicable corporate and health center-related laws and regulations. Skills/Tasks include:

1. Establish and maintain comprehensive health center risk management policies and procedures that align with internal policies and all local, state and federal laws and regulations.
2. Ensure that the health center successfully adopts ongoing risk management awareness and approaches through ongoing education and the implementation of effective systems to track, analyze, mitigate and prevent risk-related events.
3. Negotiate and oversee managed care and health plans, and risk-based and accountable care organization contracting.
4. Oversee all state and federal regulatory requirements, applications, monitoring and reporting related to and monitoring related to risk management, corporate compliance and ethics (e.g., Medicaid Integrity Program, Federal Tort Claims Act (FTCA) Deeming Application, etc.).

**XI. QUALITY IMPROVEMENT**

Designing and implementing policies, procedures and systems to manage, measure, analyze and improve organizational performance via quality improvement, resulting in greater quality of care, efficiency, cost-effectiveness, overall satisfaction and health center recognition. Also includes adhering to quality management requirements of regulatory and quality accrediting bodies [e.g., Health Resources and Services Administration (HRSA), Uniform Data Systems (UDS), Commission on Accreditation of Rehabilitation Facilities (CARF), The Joint Commission (TJC), etc.], and reporting outcomes to stakeholders. Skills/Tasks include:

1. Oversee the development and management of operations quality improvement plans and activities; productively engage relevant stakeholders in the process.
2. Maintain awareness, consideration, and integration of Triple/Quadruple Aim/Quintuple Aim and consider health equity objectives in all quality initiatives [includes quality of healthcare, patient experience, cost efficiency, and employee well-being (“Joy in Work”)].
3. Coordinate/collaborate with health center leaders on annual HEDIS/UDS reporting, progress report submission process, and population health information, including oversight of vendor data collection, analysis, and auditing.
4. Ensure compliance with organizational, state licensing standards, and national healthcare accreditation requirements.
5. Create policies and standard operating procedures for corrective action and quality improvement based on organization-wide compliance and audit initiatives.
6. Evaluate the operations department structure, policies, processes, and organizational impact for continual improvement of the efficiency and effectiveness of the group and provide opportunities for professional growth of individuals.
7. Coordinate/collaborate with health center leaders to ensure utilization of proven quality tools and techniques to foster continual improvement in operations management (e.g., quality assessments, guidelines analysis, “Plan, Do, Study, Act (PDSA) cycles,” peer review, outcomes/performance management, benchmarking, LEAN Management, etc.); actively participate (self and operations team) in the health center’s Quality Management program.
8. Communicate quality improvement plans and results with departments and the organization at large, share milestone achievements and setbacks - both large and small - and recognize exemplary performance.

# HEALTH CENTER CHIEF OPERATING OFFICER COMPETENCY DOMAINS, SKILLS/TASKS & BEHAVIORS

## I. COMMUNICATIONS & RELATIONSHIP MANAGEMENT

*Communicating clearly and concisely with key internal and external customers/stakeholders, establishing and maintaining collaborative relationships, and facilitating constructive interactions with individuals, groups, and organizations.*

SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
<p>1. Demonstrate clear, effective, and efficient communications, including the use of effective listening skills and constructive feedback; prepare reports/ documents and utilize communication strategies and media to promote stakeholder understanding; and plan and conduct impactful and productive business meetings.</p>	<p style="text-align: center;">5</p>	<ul style="list-style-type: none"> <li>■ Exhibit a high degree of patience and calmness in all communications</li> <li>■ Lead workshops/classes on communication in health care organizations</li> <li>■ Conduct presentations/talks on effective meeting management</li> <li>■ Lead/conduct meetings and presentations on a statewide, national, or international level and comfortable utilizing multiple modes of communication and technologies (laptop, smart screen, in-person, hybrid, online meeting, email, social media, etc.)</li> <li>■ Skilled at communicating about many topics with many different audiences, using analogies, stories, and other devices to engage and inspire</li> <li>■ Highly skilled at listening to various points of view and consolidating/summarizing ideas clearly and concisely</li> <li>■ Known for a charismatic/persuasive voice</li> </ul>

SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
<p>1. Demonstrate clear, effective, and efficient communications, including the use of effective listening skills and constructive feedback; prepare reports/ documents and utilize communication strategies and media to promote stakeholder understanding; and plan and conduct impactful and productive business meetings.</p>	<p style="text-align: center;">4</p>	<ul style="list-style-type: none"> <li>■ Speak less and listen more</li> <li>■ Perceived as an informed and reliable source of information</li> <li>■ Effectively build coalitions and consensus</li> <li>■ 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 operations</li> <li>■ Communicate organizational mission, vision, objectives, and priorities accurately, credibly and persuasively</li> <li>■ Lead cross-department workgroups to identify key issues and collaborate with various stakeholders to prioritize the messaging and drive results</li> <li>■ Demonstrate a deep understanding of health center issues and ability to prioritize needs</li> <li>■ Mentor future health center leaders on communication and relationship strategies and methods</li> <li>■ Manage meetings effectively and efficiently and with emotional intelligence, including setting the agenda, inviting the right people, effectively managing communication during the meeting, and identifying next steps (tasks, responsible party(ies) and time frame)</li> <li>■ Communicate in a manner that fosters staff initiative and learning, and models a discourse that discourages off-topic, rambling, self-aggrandizing, and hidden agendas</li> <li>■ Know when and how to lead, follow or support staff</li> </ul>

SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
<p>1. Demonstrate clear, effective, and efficient communications, including the use of effective listening skills and constructive feedback; prepare reports/ documents and utilize communication strategies and media to promote stakeholder understanding; and plan and conduct impactful and productive business meetings.</p>	<p>3</p>	<ul style="list-style-type: none"> <li>■ Communicate and listen effectively</li> <li>■ Ensure clarity of health center and department vision and mission through daily communications and actions</li> <li>■ Maintain a credible public persona</li> <li>■ Prepare impactful business communications, including meeting agendas, presentations, business reports and project communications and plans that are tailored to the interests and needs of the recipients and facilitate progress toward desired goals</li> <li>■ Utilize strategies for presentation of data that are tailored to the audience, facilitate appropriate interpretation and support sound decision making</li> <li>■ Articulate the factors that influence health center communication effectiveness, their strengths and weaknesses</li> <li>■ Produce business communications that require minimal oversight and editing</li> <li>■ Provide and receive constructive feedback that promotes personal and professional growth</li> <li>■ Manage meetings in an efficient, effective, and judicious manner</li> <li>■ Demonstrate on-point and concise communication at meetings; meetings start and end on time</li> <li>■ Comfortable with clinical terminology</li> <li>■ Comfortable with healthcare terminology, including Federally Qualified Health Center (FQHC) and Section 330 grants</li> </ul>



SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
<p>1. Demonstrate clear, effective, and efficient communications, including the use of effective listening skills and constructive feedback; prepare reports/ documents and utilize communication strategies and media to promote stakeholder understanding; and plan and conduct impactful and productive business meetings.</p>	<p>2</p>	<ul style="list-style-type: none"> <li>■ Identify key/most impactful health center communication channels</li> <li>■ Select appropriate communication modalities based on the message, intended impact, and the audience (e.g., email, face to face meeting, online meeting, phone call, text, etc.)</li> <li>■ Seek out feedback prior to distributing communications, reports, and presentations</li> <li>■ Produce and deliver credible and understandable reports, based on factual data</li> <li>■ Contribute to the determination of methods to present data/ information to increase understanding and application in decision making</li> <li>■ Navigate communication comfortably within diverse cultural and racial environments</li> <li>■ Demonstrate a working knowledge of clinical terminology</li> <li>■ Demonstrate a working knowledge of healthcare terminology, including Federally Qualified Health Center (FQHC) and Section 330 grants</li> </ul>

SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
<p>1. Demonstrate clear, effective, and efficient communications, including the use of effective listening skills and constructive feedback; prepare reports/ documents and utilize communication strategies and media to promote stakeholder understanding; and plan and conduct impactful and productive business meetings.</p>	<p>1</p>	<ul style="list-style-type: none"> <li>■ Understand fundamental principles and methods of communication and their specific applications</li> <li>■ Communicate effectively orally and through writing</li> <li>■ Demonstrate sensitivity to the social aspects of communication and modify behavior accordingly</li> <li>■ Demonstrate awareness of and respect for communication differences with individuals of diverse cultures, backgrounds and ethnicity, and take steps to ensure mutual understanding</li> <li>■ Learning about organizational communication strategies</li> <li>■ Learning healthcare terminology, especially for Federally Qualified Health Center (FQHC) and Section 330 grants</li> <li>■ Learning clinical terminology</li> <li>■ Ask clarifying questions when in doubt</li> </ul>

SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
<p>2. Strategically develop mutually beneficial relationships and partnerships with current and potential external health center stakeholders.</p>	<p>5</p>	<ul style="list-style-type: none"> <li>■ Communicate and collaborate regularly with peers and leaders in other organizations to create opportunities to improve health center operations and overall effectiveness</li> <li>■ Cultivate and maintain strategic external relationships with current and potential external health center stakeholders on local, state and national levels (examples include Health Resources and Services Administration (HRSA), state and local regulatory agencies; Primary Care Associations (PCAs), professional organizations, Chambers of Commerce; vendors, grant-making organizations, etc.)</li> <li>■ Advocate for the health center and the health center movement with lawmakers and other agency/association/cause leaders (local, state and national)</li> <li>■ Establish self as a trusted expert on health center operations and actively seek opportunities to lead training with the local Primary Care Association (PCA), national professional organizations, etc.</li> <li>■ Establish and nurture mutually beneficial relationships between internal team members and external stakeholders to further the mission of the health center and create opportunities for increasing operational wins</li> </ul>

SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
<p>2. Strategically develop mutually beneficial relationships and partnerships with current and potential external health center stakeholders.</p>	<p>4</p>	<ul style="list-style-type: none"> <li>■ Utilize knowledge of organizational structure and relationships to develop effective communication strategies and navigate organizational politics</li> <li>■ Project the need for and proactively develop strategic vendor, supplier, and contractor relationships</li> <li>■ Guide operations team in learning about and taking an active role in community mobilization around health care services, operations, and related issues</li> <li>■ Participate in shaping training programs for the health center community at a local or national level, and actively seek opportunities to knowledge share with peers</li> </ul>

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	<p>3</p>	<ul style="list-style-type: none"> <li>■ Continuously advocate for the health center and its community with appropriate external entities</li> <li>■ Participate in local or national conferences to develop a deeper understanding of all available industry partners and engage in establishing those relationships</li> <li>■ Seek out people and resources that can help further the mission and operational resources of the health center; independently establish mutually beneficial professional relationships</li> <li>■ Selectively collaborate with external stakeholders to increase the opportunity to engage them for future projects or business opportunities</li> <li>■ Develop and maintain supplier/vendor relationships</li> </ul>
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SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
<p>2. Strategically develop mutually beneficial relationships and partnerships with current and potential external health center stakeholders.</p>	<p>2</p>	<ul style="list-style-type: none"> <li>■ Understand how external relationships can be used to strategically further the mission of the health center</li> <li>■ Actively seek out and engage in opportunities to participate in training or events that support relationship building external to the health center</li> </ul>
	<p>1</p>	<ul style="list-style-type: none"> <li>■ Learning about current relationships and understanding where local and national resources exist</li> </ul>
<p>3. Develop collegial, mutually beneficial and strategic relationships and collaborations with internal health center stakeholders.</p>	<p>5</p>	<ul style="list-style-type: none"> <li>■ Maintain strong relationships with members of the Board of Directors</li> <li>■ Connect health center leaders with external industry leaders</li> <li>■ Serve as a mentor for health center team member(s)</li> <li>■ Champion shared decision making and communication for health center-wide initiatives</li> </ul>

SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
<p>3. Develop collegial, mutually beneficial and strategic relationships and collaborations with internal health center stakeholders.</p>	<p>4</p>	<ul style="list-style-type: none"> <li>■ Promote an ethical culture in the health center</li> <li>■ Behave as a “servant leader”</li> <li>■ Utilize knowledge of the health center’s organizational structure and relationships to develop effective communication strategies and successfully navigate internal politics</li> <li>■ Advocate for cross-department communications and collaborative projects; understand where partnerships could exist, and which stakeholders are needed to make progress towards the partnership</li> <li>■ Identify opportunities to collaborate with other senior and department leaders on long-term or limited term projects and activities</li> <li>■ Seek to know members of the senior leadership team on a personal level to facilitate understanding and empathy</li> <li>■ Promote team building among senior leaders</li> <li>■ Support relationship/team building initiatives and events across the health center</li> </ul>

SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
<p>3. Develop collegial, mutually beneficial and strategic relationships and collaborations with internal health center stakeholders.</p>	<p>3</p>	<ul style="list-style-type: none"> <li>■ Assure that operations team members are aware of important health center and industry news and communications</li> <li>■ Seek to know operations team members on a personal level to help facilitate understanding and empathy</li> <li>■ Hold mutually respectful and productive relationships with all members of the senior leadership team</li> <li>■ Participate actively in team building and in health center events; utilize opportunities to get to know individuals</li> <li>■ Exhibit an approachable demeanor</li> <li>■ Aware of internal politics and how they impact communication and relationship building</li> <li>■ Identify stakeholder communication needs/ expectations and ensure information needs are met</li> <li>■ Ensure operations team adopts a “customer service” demeanor with all staff</li> <li>■ Practice and value shared decision making</li> </ul>
	<p>2</p>	<ul style="list-style-type: none"> <li>■ Aware of the various roles and responsibilities of the members</li> <li>■ Learning about executive team need for operations communications</li> </ul>
	<p>1</p>	<ul style="list-style-type: none"> <li>■ Communicate with internal partners to understand their business needs and objectives</li> <li>■ Understand the need for maintaining productive communication with my co-workers</li> </ul>

SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
<p>4. Manage relationships effectively, with integrity, honesty, and emotional intelligence; facilitate the resolution of communication and performance disruptions and conflict proactively and in alignment with health center policies.</p>	<p>5</p>	<ul style="list-style-type: none"> <li>■ Known as a leader with a high degree of integrity</li> <li>■ Instinctively apply a high level of emotional intelligence to relationship management</li> <li>■ Sought after for advice and counsel on negotiation, and conflict and dispute resolution issues</li> <li>■ Serve on task forces/committees with conflict and dispute resolution agendas</li> </ul>

4

- Utilize a large variety of mediation, negotiation and dispute resolution techniques appropriately and effectively
- Flexible in team communications and relationships as the convener, leader, or participant
- Able to utilize emotional intelligence for relationship management with individuals across the health center
- Highly respected member of the health center leadership team
- Demonstrates strong working relationships with key health center leaders (e.g., physician and administrator leadership teams)



SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
<p>4. Manage relationships effectively, with integrity, honesty, and emotional intelligence; facilitate the resolution of communication and performance disruptions and conflict proactively and in alignment with health center policies.</p>	<p>3</p>	<ul style="list-style-type: none"> <li>■ Able to utilize/describe health center policy and demonstrate several effective techniques to resolve conflicts and disputes</li> <li>■ Know my Emotional Intelligence profile, including how it impacts my communications with others, and steps to take to improve my communication results</li> <li>■ In collaboration with Human Resources, facilitate Alternative Dispute Resolution (ADR)</li> <li>■ Use various means and methods to promote open and constructive communication among the team</li> <li>■ Demonstrate awareness of labor relations communications guidelines and utilize appropriate strategies</li> <li>■ Utilize understanding of group dynamics and process strategies to plan effective conflict/dispute resolution</li> <li>■ Describe stakeholders' positions and the rationale for those positions</li> <li>■ Focus on seeking clarification about the situation/concern at hand rather than personal issues</li> <li>■ Ask clarifying questions without challenging or threatening</li> <li>■ Seek out feedback and listen to team members at all levels of the department</li> </ul>
	<p>2</p>	<ul style="list-style-type: none"> <li>■ Understand the fundamentals of Emotional Intelligence and the role it plays in effective communications and relationship management</li> <li>■ Possess a working knowledge of health center policies related to conflict resolution and labor relations</li> <li>■ Navigate comfortably within diverse cultural and racial environments</li> </ul>

SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
<p>4. Manage relationships effectively, with integrity, honesty, and emotional intelligence; facilitate the resolution of communication and performance disruptions and conflict proactively and in alignment with health center policies.</p>	<p>1</p>	<ul style="list-style-type: none"> <li>■ Learning about Emotional Intelligence and the role it plays in ongoing communications</li> <li>■ Learning about group dynamics and processes and how they influence team communication</li> <li>■ Learning about health center policies and procedures about dispute and conflict resolution</li> <li>■ Learning about labor relations</li> </ul>

## II. LEADERSHIP

*Inspiring individual and organizational excellence, creating a shared vision and successfully managing change to attain the organization’s strategic ends and successful performance. Includes managing resources and leading the health center effectively and ethically; understanding stakeholder needs and priorities, the health care environment, the power of diversity and inclusiveness, and the unique dynamics of the health center model. Also includes skills and tasks associated with organizational dynamics and governance and overall organizational leadership, development, and effectiveness.*

SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
<p>1. Model appropriate behaviors and expect others to adhere to all health center policies, procedures, regulations, and laws (moral leadership).</p>	<p>5</p>	<ul style="list-style-type: none"> <li>■ Advocate for policy development, improvement and compliance that ensures personal accountability throughout the health center</li> <li>■ Advocate for and lead behavior change at the executive level by setting the appropriate example</li> <li>■ Known as a leader with a strong moral center and effectiveness in bringing about positive change</li> <li>■ Intuitively and effectively adapt leadership style and techniques to various situations</li> <li>■ Able to discuss and incorporate and apply effective management techniques and theories in leadership activities</li> <li>■ Take on leadership roles with external organizations relationships</li> <li>■ Advocate and participate in healthcare policy initiatives</li> </ul>

SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
<p>1. Model appropriate behaviors and expect others to adhere to all health center policies, procedures, regulations, and laws (moral leadership).</p>	<p>4</p>	<ul style="list-style-type: none"> <li>■ Set expectation for peers and subordinates to adhere to health center policies, procedures, regulations and laws</li> <li>■ Able to articulate and model the application of health center policies, procedures, regulations and laws in many situations</li> <li>■ Exhibit an effective style of leadership with all health center stakeholder groups, including physicians, managers, nurses, technical and other staff groups</li> <li>■ Able to discuss and skillfully debate potential impacts and consequences of decision making in situations both internal and external</li> <li>■ Champion solutions and encourage decision making with the executive team</li> <li>■ Support and mentor high-potential talent within the organization</li> </ul>

3

- Develop a consistent and effective style of leadership, continually learning what works best in different situations
- Adhere to health center policies, procedures, regulations and laws
- Assure subordinates adhere to health center policies, procedures, and related regulations and laws
- Foster an environment of mutual trust

SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
<p>1. Model appropriate behaviors and expect others to adhere to all health center policies, procedures, regulations, and laws (moral leadership).</p>	<p>2</p>	<ul style="list-style-type: none"> <li>■ Demonstrate awareness of the health center policies, procedures, and related regulations and laws</li> <li>■ Can articulate some of the ways the policies impact the health center and personal behavior</li> <li>■ Learning about different leadership styles and techniques; intentionally apply different techniques to situations to “try them on”</li> </ul>
	<p>1</p>	<ul style="list-style-type: none"> <li>■ Learning about the health center policies, procedures, regulations and laws</li> <li>■ Articulate how the policies impact personal behavior</li> <li>■ Learning about leadership styles</li> </ul>
<p>2. Advocate for the health center mission, values, and culture internally and externally; identify/cultivate opportunities through active participation in industry networks.</p>	<p>5</p>	<ul style="list-style-type: none"> <li>■ Engage external partners from community, government, business, education and other service entities to create funding/service solutions to achieve the health center’s mission and support its values and culture</li> <li>■ Establish compelling organizational vision and goals</li> <li>■ Establish and nurture mutually beneficial relationships with influential leaders and organizations engaged/interested in health care</li> <li>■ Pursue opportunities for creating beneficial collaborations with existing/emerging/competitive health care entities</li> <li>■ Take calculated risks in seeking and developing new opportunities with various entities</li> <li>■ Advocate for health center membership and participation in appropriate state and national organizations</li> </ul>

SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
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2. Advocate for the health center mission, values, and culture internally and externally; identify/cultivate opportunities through active participation in industry networks.

4

- Behave consistently in a manner motivated and guided by the health center mission, values and culture
- Engage internal partners to improve operations so that the health center mission is supported
- Create a health center climate that facilitates individual motivation
- Encourage a high level of commitment to the purpose and values of the organization
- Participate actively in local and national organization work groups
- Identify and participate in and may create opportunities for professional networking and sharing information (for example, book club)

3

- Consider the health center mission, values and culture in decision-making
- Describe the health center mission and purpose comprehensively
- Describe the purpose of the Operations Department in promoting the health center mission and purpose
- Hold self and others accountable for health center goal attainment
- Gain physicians buy-in to accept risk and support new business ventures
- Attend professional and industry meetings and conferences
- May participate in work groups of membership organizations
- Hold membership of one or more appropriate professional organizations and trade groups
- Encourage staff to join and/or participate in professional organizations and trade groups

SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
2. Advocate for the health center mission, values, and culture internally and externally; identify/cultivate opportunities through active participation in industry networks.	2	<ul style="list-style-type: none"> <li>■ Describe the fundamentals of the health center movement</li> <li>■ Articulate the health center mission and values</li> <li>■ Aware of industry groups and member organizations</li> <li>■ May join member organizations as an individual</li> </ul>
	1	<ul style="list-style-type: none"> <li>■ Learning about the health center movement, why it exists, and the people served</li> <li>■ Explore industry groups and member organizations</li> </ul>
3. Advocate for genuine diversity and appropriate inclusion within the Board of Directors, staff, health center-related community groups and vendors.	5	<ul style="list-style-type: none"> <li>■ Articulate a deep understanding of the need for diversity and inclusion that includes how the disparities emerged and practical, ethical ways health centers are obligated to address them</li> <li>■ Utilize national professional network to recruit a diverse pool of candidates for health center leadership positions and Board of Directors</li> <li>■ Persuasively articulate how assuring diversity in health center operations improves patient care and satisfaction, employee engagement, financial performance, and overall health of the community</li> </ul>

SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
<p>3. Advocate for genuine diversity and appropriate inclusion within the Board of Directors, staff, health center-related community groups and vendors.</p>	<p>4</p>	<ul style="list-style-type: none"> <li>■ Champion the implementation of policies supporting diversity and inclusion</li> <li>■ Advocate for methods to continually improve the implementation of policies, activities to promote and celebrate diversity and inclusion</li> <li>■ Advocate for and take proactive steps to increase diversity in candidates for and composition of the health center staff, board, vendors and community partners</li> <li>■ Facilitate development of health center policies that support diversity and inclusion and the dissemination of information and training to support implementation</li> <li>■ Create an organizational climate that encourages teamwork</li> </ul>

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<p>3</p>	<ul style="list-style-type: none"> <li>■ Assess the organization, including corporate values and culture, business processes and impact of systems on operations</li> <li>■ Articulate an understanding of why addressing diversity and inclusion concerns is important to the health center mission</li> <li>■ Model appropriate sensitivity and concern for assuring that diverse perspectives are represented in decision making concerning health center operations</li> <li>■ Advocate for diversity and inclusion within the operations team</li> <li>■ Create a safe environment among the operations team for learning and self-reflection on attitudes, policies, activities, etc., that promote or discourage diversity and inclusion</li> <li>■ Consistently implement and support health center policies on diversity and inclusion</li> </ul>
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SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
3. Advocate for genuine diversity and appropriate inclusion within the Board of Directors, staff, health center-related community groups and vendors.	2	<ul style="list-style-type: none"> <li>■ Aware of disparities in diversity and inclusion and how the health center addresses them</li> <li>■ Demonstrate some understanding of why the disparities related to diversity exist, why they are important to address or what to do about them</li> <li>■ Aware of personal biases and utilize effective strategies to limit their influence on decision-making and interactions</li> </ul>
	1	<ul style="list-style-type: none"> <li>■ Aware of the diversity of staff and patients</li> <li>■ Learning about diversity and inclusion and impact on health equity</li> <li>■ Understand diversity and inclusion is a concern for the health center</li> </ul>
4. Model and promote sensitivity to diverse cultures, behaviors and illness perspectives of patients, families, and health center staff, and advocate for health equity.	5	<ul style="list-style-type: none"> <li>■ Engage in creative development and promotion of collaborations with external partners to help ensure healthcare equity</li> <li>■ Participate in state, national and/or international task forces, committees, presentations, online forums, etc., that promote or work toward creating healthcare equity</li> <li>■ Share strategies for creating healthcare equity among health centers</li> <li>■ Intentional about advocating for the dismantling of structures and policies that create health inequity</li> </ul>

SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
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4. Model and promote sensitivity to diverse cultures, behaviors and illness perspectives of patients, families, and health center staff, and advocate for health equity.

4

- Engage in open and honest discussions with Executive team and health center leaders about diversity, language barriers and cultural differences in ways that promote understanding and engender trust
- Foster an environment of inclusion, where diverse thoughts and perspectives are freely shared, respected and integrated
- Advocate for activities in the health center that celebrate the expression of diverse cultures, ethnicity and communities
- Utilize an understanding of individual differences to communicate with, influence, and manage individuals (e.g., resolving conflict, building teams) throughout the organization
- Develop health center policies and procedures that encourage awareness and acceptance of diversity

3

- Model sensitivity concerning diverse cultures, behaviors and illness perspectives
- Set expectation for and educate staff members to behave in ways that demonstrate an awareness of and sensitivity to diverse cultures, behaviors and illness perspectives
- Use personal influence to help others increase their awareness and acceptance of individual differences
- Ensure that operations policies/procedures are inclusive
- Articulate an understanding of the resources needed to adequately address the health needs of a culturally and racially diverse population

SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
4. Model and promote sensitivity to diverse cultures, behaviors and illness perspectives of patients, families, and health center staff, and advocate for health equity.	2	<ul style="list-style-type: none"> <li>■ Understand why sensitivity to diverse behaviors and illness perspectives is central to the health center mission</li> <li>■ Build collaborative and mutually beneficial working relationships with people regardless of their individual differences</li> <li>■ Understand that differences exist in behaviors and illness perspectives that are related to diversity</li> <li>■ Modify communication and behavior based on an understanding of individual differences</li> </ul>
	1	<ul style="list-style-type: none"> <li>■ Learning about diversity-related differences in behaviors and illness perspectives</li> <li>■ Learning about historical and current structures and policies that contribute to health and health care inequity</li> <li>■ Treat all individuals with respect regardless of individual differences (e.g., race, gender, age, ethnicity, physical capabilities/challenges, sexual orientation, gender preference or religion)</li> </ul>
5. As a member of the Executive team, lead the development and alignment of the operational components of the health center's strategic plan and review activities; set direction, strategize around opportunities and threats and review goals, objectives, and outcomes on an organization-wide, ongoing basis.	5	<ul style="list-style-type: none"> <li>■ Disseminate and contribute to current best practices in the development, alignment, monitoring and assessment of health center operating plans</li> <li>■ Engage content experts and thought leaders in the development and alignment of health center operating and strategic planning</li> <li>■ Envision and lead the development of training, communications and procedures to enhance the alignment of the operations components of the health center's strategic plan</li> <li>■ Understand the operations role exists to support the service mission of the health center</li> </ul>

SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
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5. As a member of the Executive team, lead the development and alignment of the operational components of the health center’s strategic plan and review activities; set direction, strategize around opportunities and threats and review goals, objectives, and outcomes on an organization-wide, ongoing basis.

4

- Proactively engage health center leaders in the alignment of the development, monitoring and assessment of the health center’s strategic and operating plans
- Establish rules, procedures and processes for the health center to follow that support the HC strategic and operating plans
- Enhance/improve efficiency of processes related to the development and management of the strategic plan
- Anticipate and support management of change throughout the health center
- Anticipate and plan strategies for overcoming obstacles

3

- Oversee the implementation of existing rules, procedures and processes related to the alignment and management of the health center strategic and operating plans
- Collaborate with multiple departments and functions to align the operations components of the strategic plan throughout the health center
- Articulate how health center department operating and strategic plans align to impact/support the health center
- Anticipate the need for resources to carry out initiatives
- Manage change effectively with the operations team
- Develop effective medical and other staff relationships in support of the organization’s mission, vision and strategic plan

SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
<p>5. As a member of the Executive team, lead the development and alignment of the operational components of the health center’s strategic plan and review activities; set direction, strategize around opportunities and threats and review goals, objectives, and outcomes on an organization-wide, ongoing basis.</p>	2	<ul style="list-style-type: none"> <li>■ Articulate what a strategic plan is and how operations supports the plan</li> <li>■ Understand the difference between strategic and operating plans</li> <li>■ Support the development of elements of the operations department plan</li> </ul>
	1	<ul style="list-style-type: none"> <li>■ Learning what operating and strategic plans are and how operations supports their development and implementation</li> <li>■ Contribute to the strategic and operating plans in discrete ways</li> </ul>
<p>6. Maintain strong, positive, and mutually supportive relationships with the health center’s Board of Directors, leadership, and staff.</p>	5	<ul style="list-style-type: none"> <li>■ 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 and operations performance of the health center</li> <li>■ Establish self as a trusted operations leader using innovative approaches to deepen the leadership and Board’s understanding of health center operations and their roles in supporting its operational health</li> </ul>
	4	<ul style="list-style-type: none"> <li>■ Lead the development and presentation of operations reports and information for the health center leadership and the Board of Directors</li> <li>■ Proactively and appropriately engage health center leadership and Board of Directors members in identifying solutions to support operations goals and outcomes of the health center</li> <li>■ Visible and accessible to staff across the health center</li> <li>■ Participate in or lead committees tasked to develop and implement activities that support staff engagement and relationship (e.g., holiday celebrations, recognitions, health fairs, fund raising events, etc.)</li> </ul>

SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
6. Maintain strong, positive, and mutually supportive relationships with the health center’s Board of Directors, leadership, and staff.	3	<ul style="list-style-type: none"> <li>■ Develop health center operations reports and presentations tailored to the information and learning needs of the health center leadership and Board</li> <li>■ Manage health center leadership and Board expectations for health center operations performance</li> <li>■ Create opportunities for staff to learn about health center operations</li> <li>■ Participate actively in health center activities and events where staff members will be in attendance</li> <li>■ Communicate health center operations priorities and highlights of performance to health center staff regularly</li> </ul>
	2	<ul style="list-style-type: none"> <li>■ Understand the key functions and staff composition of the health center departments</li> <li>■ Learning about the functions of the Board of Directors and what they want and need to need to know about health center operations</li> </ul>
	1	<ul style="list-style-type: none"> <li>■ Learning the general and fiduciary functions of the Board and roles and accountabilities of the various health center departments</li> </ul>
7. Identify learning needs and advocate for training and technical support to properly implement operational policies and procedures; continuously educate executives/ management and empower them to inform, train and support all staff members.	5	<ul style="list-style-type: none"> <li>■ Work with health center executives to identify and understand the key metrics/indicators that drive operation success for the health center and their roles in training and supporting their respective teams</li> <li>■ Communicate throughout the health center the relationship of everyone’s role in properly implementing operations policies and procedures</li> <li>■ Promote continuous organizational learning/ improvement</li> </ul>

SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
<p>7. Identify learning needs and advocate for training and technical support to properly implement operational policies and procedures; continuously educate executives/ management and empower them to inform, train and support all staff members.</p>	<p>4</p>	<ul style="list-style-type: none"> <li>■ Assess, educate and coach executive team members to improve their understanding and implementation of health center metrics/indicators and the factors influencing their movement</li> <li>■ Advocate for new and effective training and resources to assist health center leaders in properly implementing operations policies and procedures</li> <li>■ Explore opportunities for the growth and development of the organization on a continuous basis</li> </ul>
	<p>3</p>	<ul style="list-style-type: none"> <li>■ Assess, educate and coach operations team members to improve their understanding and implementation of health center metrics/indicators and the factors influencing their movement</li> <li>■ Contribute to the ongoing improvement of available training and resources</li> <li>■ Articulate the factors that influence the movement of key metrics/indicators and the operational impacts and the implications of their role in those processes</li> </ul>
	<p>2</p>	<ul style="list-style-type: none"> <li>■ Routinely access health center training and support resources to implement operations policies and procedures effectively and efficiently</li> <li>■ Aware of many of the training and resources available</li> <li>■ Seek advice/guidance for accessing health center training and support to improve understanding and implementation of specific operational policies and procedures</li> </ul>
	<p>1</p>	<ul style="list-style-type: none"> <li>■ Aware of health center operations policies and procedures and where to find them</li> <li>■ Receive guidance and coaching on accessing learning resources</li> </ul>

SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
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8. Maintain and utilize knowledge of the unique dynamics of the health center model, current trends, and information in health care regulations, compliance, and best practices and their impacts on the effectiveness of the organization's operations and the Chief Operating Officer (COO) role in decision-making and information sharing.

5

- Demonstrate a deep understanding of the unique qualities and dynamics of health center operational models and their impacts on its structure and functions
- Facilitate the development of innovative partnerships to offer health center patients the services they need through external entities with partnership/implementation/funding/reimbursement models that support the delivery of those services
- Participate in shaping trends and creating knowledge in health care by serving on statewide, national or international committees and tasks forces
- Interpret and predict the impacts of current trends and information on the health center's operations
- Proactively identify and develop solutions to address adverse impact and take advantage of opportunities with emerging and current trends

4

- Continually seek out current information and trends
- Apply new knowledge to current practices, policies and decision-making in the operations department and facility-wide
- Participate in health center and local work groups
- Engage with health center leaders to proactively identify and implement processes to increase efficiency and effectiveness in the utilization of health center resources

3

- Independently maintain awareness of current trends and information; attend conferences
- Share new information with team members
- Demonstrate an understanding of how to identify and solve problems related to health center operations



SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
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8. Maintain and utilize knowledge of the unique dynamics of the health center model, current trends, and information in health care regulations, compliance, and best practices and their impacts on the effectiveness of the organization's operations and the Chief Operating Officer (COO) role in decision-making and information sharing.

2

- Actively seek out and engage in health center learning opportunities concerning current trends and information
- Demonstrate a general understanding of health center operations management and how it contributes to the overall success of the health center

1

- Participate in health center-directed learning opportunities concerning trends and information
- Learning about health center operations management and how it contributes to the overall success of the health center

### III. PROFESSIONALISM

*Aligning personal and organizational conduct with ethical and professional standards that include a responsibility to the patient and community, a service orientation, and a commitment to lifelong learning and improvement. Also applying knowledge, sensitivity and judgment to act effectively and with personal integrity in accordance with the fundamental principles of professional and personal ethical behavior; and effectively managing self and resources to achieve the health center mission and objectives.*

SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
1. Demonstrate commitment to the highest standards of ethical responsibility, credibility, objectivity, accountability, and trustworthiness.	5	<ul style="list-style-type: none"><li>■ Set a consistent and strong example for upholding fair and honest ethical and moral standards</li><li>■ Have developed a sense of discernment for when the standards should be challenged and/or modified</li><li>■ Contribute to the knowledge base in health care concerning professionalism, including ethical decision-making via presentations, teaching and writing</li></ul>
	4	<ul style="list-style-type: none"><li>■ Advocate for an ethical culture in the health center</li><li>■ Serve as the ethical guide for the organization</li><li>■ Listen actively to contrary/diverse views and perspectives and am open to change</li><li>■ Advocate for ideas based on facts and experience</li><li>■ Ensure consequences from non-compliance of ethical standards are administered fairly</li><li>■ Consistently interpret standards, challenge where appropriate and make recommendations for change</li><li>■ Serve as a member of the health center's Ethics Committee (or equivalent)</li><li>■ Understand the requirements for ethical implications human subject research and when they apply to specific situations</li></ul>

SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
<p>1. Demonstrate commitment to the highest standards of ethical responsibility, credibility, objectivity, accountability, and trustworthiness.</p>	<p>3</p>	<ul style="list-style-type: none"> <li>■ Advocate for and maintain high standards of business and professional ethics and understand the consequences of unethical behavior</li> <li>■ Advocate for cultural and spiritual diversity for patients and staff as they relate to healthcare needs</li> <li>■ Adhere to ethical, honest, rigorous, and transparent business practices, including the ethical utilization of funding based on source and approved/ intended utilization</li> <li>■ Manage conflict of interest situations as prescribed by health center bylaws, policies and procedures</li> <li>■ Advocate for patient rights and responsibilities</li> <li>■ Ensure staff compliance with all health center employee-related policies and procedures (including compliance)</li> <li>■ Advocate for hiring providers and staff qualified/ certified according to state and national professional standards and supporting their continual professional development</li> <li>■ Encourage knowledge of and demonstration of professional norms and standards of behaviors as defined by professions such as American Hospital Association (AHA), physician's oaths and other professional pledges</li> </ul>

SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
1. Demonstrate commitment to the highest standards of ethical responsibility, credibility, objectivity, accountability, and trustworthiness.	2	<ul style="list-style-type: none"> <li>■ Demonstrate knowledge of and support professional roles, responsibility and accountability</li> <li>■ Understand and adhere to professional standards and codes of ethical behavior</li> <li>■ Exercise trustworthiness in even the most unfavorable circumstances</li> <li>■ Share operational concerns with the appropriate stakeholders at the first opportunity</li> <li>■ Resolve conflicting perspectives by addressing the issue rather than taking a defensive or aggressive posture</li> <li>■ Know the source of funding for the current operational budget for each department and rationale</li> </ul>
	1	<ul style="list-style-type: none"> <li>■ Possess a high level of moral integrity</li> <li>■ Learning about the health center's expectations for ethical behavior and how they intersect with operations</li> <li>■ Learning workflow, patient and staff make up of other departments</li> <li>■ Describe the current operational budget for each department and rationale</li> </ul>
2. 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.).	5	<ul style="list-style-type: none"> <li>■ 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</li> <li>■ Practice informed reflection and action based upon the major changes that will occur in the next 10, 20 or more years ("Future Think")</li> <li>■ Mentor, advise and coach</li> </ul>

SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
<p>2. 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.).</p>	<p>4</p>	<ul style="list-style-type: none"> <li>■ Known to manage from a position of knowledge, experience, and confidence</li> <li>■ Seek out opinions/information and listen to staff members at all levels of the health center</li> <li>■ Establish collegial relationships with leaders in the industry who can provide sound advice and counsel</li> <li>■ Engage with a network of peers/partners to discuss current issues, trends and solutions</li> <li>■ Assess operations learning needs of the health center and Board of Directors and lead the development and implementation of educational activities</li> <li>■ Ensure that operations reports, and information shared with the Board enhance their understanding and support fully informed decision-making</li> </ul>
	<p>3</p>	<ul style="list-style-type: none"> <li>■ Develop, modify, and adhere to a self-directed professional development plan based on honest self-assessment of learning and behavior needs</li> <li>■ Willing to explore options for assessment of competence and learning that are outside of my comfort zone</li> <li>■ Seek out the advice and counsel of my peers and leadership team</li> <li>■ Maintain knowledge of current trends and information in health care, the health center movement and operations management</li> <li>■ Acquire and stay current with the professional body of knowledge and the healthcare industry utilizing a variety of methods, including reading, attending state, regional, Primary Care Association (PCA) and national conferences, online learning, news broadcasts, etc.</li> <li>■ Join and participate in professional organizations</li> <li>■ Subscribe to and review health and management industry publications</li> </ul>

SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
<p>2. 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.).</p>	<p>2</p>	<ul style="list-style-type: none"> <li>■ Take part in personal development opportunities presented by outside entities</li> <li>■ Develop plans (including time frames) to achieve personal development goals</li> <li>■ Seek regular feedback and guidance on performance and learning needs and advice on how to address them</li> <li>■ Ensure that my personal goals are included in annual performance review &amp; planning</li> <li>■ Maintain thorough understanding of the current operational status of the health center and identify areas of personal development needed to address them</li> <li>■ Participate in educational activities</li> </ul>

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<p>1</p>	<ul style="list-style-type: none"> <li>■ Have completed a self-assessment to establish my baseline performance levels/current status</li> <li>■ Engage my manager and peers in constructive dialogue about my personal and professional goals</li> <li>■ Maintain awareness of resources available at National Association of Community Health Centers (NACHC)</li> <li>■ Familiar with the role of the Primary Care Association (PCA), resources available to support operations management of health centers and take part in Primary Care Association (PCA) activities</li> <li>■ Subscribe to and read healthcare periodicals, for example, Modern Healthcare, Journal of Healthcare Management, etc.</li> </ul>
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SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
<p>3. Participate in local, state, national and international opportunities for professional development, networking, and health center movement advocacy.</p>	<p>5</p>	<ul style="list-style-type: none"> <li>■ Perceived as an expert in health center leadership; possess a well-rounded/circumspect understanding of the health center movement and contemporary issues and concerns</li> <li>■ Active with local and state and national governance boards, committees and departments</li> <li>■ Analyze the local community health care environment through the lens of national health care trends and resources (funding/technical support) to identify strategies to improve local healthcare initiatives and outcome</li> <li>■ Develop forward-thinking strategies for the health center through forecasting needs for programmatic enhancements for future growth</li> <li>■ Advocate for role of health center as a community partner and provider of healthcare</li> </ul> <p>4</p> <ul style="list-style-type: none"> <li>■ Contribute to professional body of knowledge and evidence-based practices concerning health centers on state and national levels (e.g., publish, present, advise, technical assistance, etc.)</li> <li>■ Persuasively engage all appropriate internal and external stakeholders in service to the health center movement</li> <li>■ Lead state and national collaborative group projects, identifying and managing self-learning, group learning, and networking needs effectively</li> </ul>

SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
<p>3. Participate in local, state, national and international opportunities for professional development, networking, and health center movement advocacy.</p>	<p>4</p>	<ul style="list-style-type: none"> <li>■ Take opportunities to develop community partnerships to support delivery of health outreach projects</li> <li>■ Participate actively in local community groups (e.g., community relations councils, neighborhood/community-based associations, local school boards, cultural organizations, etc.) and identify and manage self-learning, networking/communication needs effectively</li> <li>■ Assume leadership roles in professional and member organizations related to health care</li> <li>■ Encourage team members to engage in local, state, national and international professional development opportunities</li> <li>■ Identify appropriate health center team members/representatives for effective group work and outcomes</li> <li>■ Perceived as an informed, fact-based source of information and guidance</li> <li>■ Seek to understand the basis or foundation for different perspectives represented in the group and utilize that knowledge to strengthen development of advocacy strategies</li> </ul>



SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
<p>3. Participate in local, state, national and international opportunities for professional development, networking, and health center movement advocacy.</p>	<p>3</p>	<ul style="list-style-type: none"> <li>■ Develop local partnerships to assist in advocacy endeavors</li> <li>■ Advocate for patients, families and communities</li> <li>■ Participate in health center/local collaborative group projects, and identify and manage self-learning and networking/ communication needs effectively</li> <li>■ Regularly participate in learning opportunities to stay abreast of issues impacting the health care of the local community</li> <li>■ Advocate for resources to strengthen local healthcare initiatives and outcomes</li> <li>■ Participate in professional and member organizations related to health care</li> <li>■ Manage and establish measures for effective group process and goal-oriented outcomes</li> <li>■ Able to lead effectively or serve as a productive member of internal groups effectively</li> </ul>

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<p>2</p>	<ul style="list-style-type: none"> <li>■ Participate in community service</li> <li>■ Contribute to initiatives that help patients become the best advocates for their own healthcare</li> <li>■ Understand health center mission and vision and how they integrate with and support the community</li> <li>■ Monitor state political activity</li> <li>■ Describe the current functions, operational budget and sources of funding for each department and rationale</li> <li>■ Learning about the specific health-related concerns and advocacy needed for the community served by the health center</li> </ul>
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SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
3. Participate in local, state, national and international opportunities for professional development, networking, and health center movement advocacy.	1	<ul style="list-style-type: none"> <li>■ Learning about advocacy initiatives that support the needs of the community</li> <li>■ Learning about the health-related needs of the local community</li> <li>■ Attend city hall and other community meetings from time to time</li> <li>■ Aware of local and national professional advocacy groups in health care</li> <li>■ Learning about department roles, staffing, workflows, funding, and reimbursement structure</li> <li>■ Learning about the health concerns of the community served by the health center</li> </ul>
4. Maintain work-life harmony and personal health.	5	<ul style="list-style-type: none"> <li>■ Exemplify and inspire others to achieve work-life harmony</li> <li>■ Organize community-wide events to support community health and provide recreational outlets for health center staff</li> <li>■ Advocate for policies and programs that encourage work-life harmony</li> <li>■ Participate in national committees/task forces on work-life harmony, joy in work, etc.</li> <li>■ Write and/or present about the importance of work-life harmony and strategies for achieving it</li> </ul>
	4	<ul style="list-style-type: none"> <li>■ Involved personally in local community and government festivals, causes, sporting events and other activities</li> <li>■ Possess and engage in strong personal interests outside of work</li> <li>■ Engage the health center in local community and government festivals, charitable causes, sporting events and other activities with recreational elements</li> <li>■ Work with the executive team to implement policies and resources to support work-life harmony across the health center</li> </ul>

SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
4. Maintain work-life harmony and personal health.	3	<ul style="list-style-type: none"> <li>■ Practice effective time management and delegation techniques</li> <li>■ 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)</li> <li>■ Manage flexible work schedules responsibly</li> <li>■ 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.)</li> <li>■ Take time off from work for recreation and relaxation on a regular basis, for example: annual vacations, pampering, family time, etc.; do not hoard Paid Time Off (PTO)</li> <li>■ Support work/life harmony for staff members</li> <li>■ Able to think creatively about how to efficiently complete work-related and other tasks</li> <li>■ Regularly assesses physical and emotional health and takes steps to improve or maintain status</li> </ul>

2

- Understand that work-life harmony is important for overall emotional and physical well-being and overall sense of fulfillment and joy at work
- Understand that maintaining a regular and reasonable work schedule supports work-life harmony
- Engage with co-workers in recreational/fun activities
- Utilize a few strategies to manage stress

SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
4. Maintain work-life harmony and personal health.	1	<ul style="list-style-type: none"> <li>■ Aware that working long hours consistently is not healthy or sustainable</li> <li>■ Aware of the real time requirements to meet job-related objectives</li> <li>■ List and prioritize daily/weekly/monthly work tasks on a regular basis (for example, "To Do Lists") to ensure focus is maintained on activities that are the most important and share lists with appropriate stakeholders</li> <li>■ Learning about time and stress management strategies</li> <li>■ Aware that good health supports the ability to be effective on the job</li> </ul>

## IV. OPERATIONS MANAGEMENT

*Planning, developing, organizing, and managing systematic processes to achieve and maintain the highest levels of health center performance, including efficiency, effectiveness, efficacy, and overall quality.*

*Oversees the development and implementation of staffing plans; patient care throughput, quality and outcomes management; and the utilization of supplies, equipment, and facilities while assuring alignment with the health center's mission, values, financial and programmatic goals, and regulatory, accreditation [e.g., Federal Tort Claims Act (FTCA), Operational Site Visits (OSV)], and legal/requirements.*

SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
<p>1. Ensure the development, integration, effective management, and sustaining of accurate and efficient systems, policies and procedures for the health center's operational functions (for example, clinical operations, clinical quality, risk management, and compliance and regulatory management, strategic and annual planning, operations reporting and management, decision support for financial and community health outcomes, etc.)</p>	<p>5</p>	<ul style="list-style-type: none"> <li>■ Serve as a subject matter expert and/or thought leader on issues and provide guidance, develop new protocols, and develop others/teams</li> <li>■ Monitor industry trends for new performance indicators and or areas of growth</li> <li>■ Proactively engage with department leaders, provide guidance and set expectations for meeting goals and priorities</li> <li>■ Identify, analyze, and interpret trends or patterns in complex data sets</li> <li>■ Develop solutions for both predictable and unpredictable events or circumstances, and determine which will yield the most favorable outcomes</li> <li>■ Compare key operations indicators across similar health centers/systems, and adjust where needed</li> </ul>

SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
<p>1. Ensure the development, integration, effective management, and sustaining of accurate and efficient systems, policies and procedures for the health center's operational functions (for example, clinical operations, clinical quality, risk management, and compliance and regulatory management, strategic and annual planning, operations reporting and management, decision support for financial and community health outcomes, etc.)</p>	<p style="text-align: center;">4</p>	<ul style="list-style-type: none"> <li>■ Develop and implement databases, data collection systems, data analytics and other strategies that optimize statistical efficiency and quality</li> <li>■ In collaboration with senior management, identify and recommend analytics tools and software to help improve operational performance (e.g., reduce healthcare costs, reduce wait times, improve efficiency in utilization of clinical staff roles/staffing models, increase patient access, etc.)</li> <li>■ Lead the health center in establishing systems and processes to effectively develop and manage operating goals</li> <li>■ In collaboration with the Chief Financial Officer (CFO), create efficient systems to collect, report, and analyze operations data to contribute to the Annual Financial Audit</li> <li>■ Articulate and coach others on the importance and relevance of data to effective decision-making</li> <li>■ Leverage knowledge of key factors that most influence performance and performance indicators (internal and external) to improve health center operations</li> <li>■ Manage multiple projects and employees simultaneously and delegate tasks/projects appropriately</li> <li>■ Work collaboratively with senior management and departments to identify and develop new operations, and improve existing operations policies as needed (internally and externally mediated)</li> <li>■ Collaborate with/educate senior management and ensure all health center staff have appropriate understanding of compliance issues related to health center operations</li> <li>■ Educate and coach operations team members to improve their understanding of operations, policies and procedures, and compliance regulations</li> </ul>

SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
<p>1. Ensure the development, integration, effective management, and sustaining of accurate and efficient systems, policies and procedures for the health center's operational functions (for example, clinical operations, clinical quality, risk management, and compliance and regulatory management, strategic and annual planning, operations reporting and management, decision support for financial and community health outcomes, etc.)</p>	<p style="text-align: center;">3</p>	<ul style="list-style-type: none"> <li>■ Establish Key Performance Indicators (KPIs), benchmarks, and other performance analytics required to manage health center operations effectively and efficiently (e.g., benchmarks related to costs, revenue, profit/loss, and other margins, etc.)</li> <li>■ Implement reporting and management systems to track, monitor, and forecast performance trends, operational goals, identify opportunities for improvement, and develop and implement recommended action plans (e.g., reporting content and schedules, dashboards, operations review meetings, etc.) to achieve strategic and operational goals</li> <li>■ Partner with finance and revenue cycle leaders on annual revenue and expense budget projections and filing of important reports</li> <li>■ Contribute data/information [e.g., from the Uniform Data Systems (UDS) report] and general analytic insights to support the Annual Financial Audit, as requested by the Chief Financial Officer (CFO)</li> <li>■ Assure availability and integrity of data utilized for decision-making from primary and secondary sources and systems and their appropriate application in managing health center operations (e.g., budget, benchmarks related to costs, revenue, profit/loss and other margins, filing of reports, etc.)</li> <li>■ Oversee the utilization of appropriate analytics tools and software to help improve operational performance (e.g., reduce healthcare costs, reduce wait times, improve efficiency in utilization of clinical staff roles/ staffing models, increase patient access, etc.)</li> <li>■ Identify and utilize effective process management strategies, techniques (i.e., Lean Management, Six Sigma, Plan-Study-Do-Act (PDSA), etc.), and predictive analytics to optimize operations</li> <li>■ Utilize current Generally Accepted Accounting Principles (GAAP) for reporting health center operations results</li> <li>■ Ensure all required and necessary health center operations, legal and regulatory-related policies and procedures are created, maintained and communicated to team members at appropriate intervals in collaboration with senior and departmental leadership</li> <li>■ Effectively manage, engage and partner with internal and external stakeholders to optimize understanding, effectiveness, and utilization of operations management processes, systems, and reports</li> </ul>

SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
<p>1. Ensure the development, integration, effective management, and sustaining of accurate and efficient systems, policies and procedures for the health center's operational functions (for example, clinical operations, clinical quality, risk management, and compliance and regulatory management, strategic and annual planning, operations reporting and management, decision support for financial and community health outcomes, etc.)</p>	<p>2</p>	<ul style="list-style-type: none"> <li>■ Understand the importance of accurate and appropriate financial and operational metrics in ongoing decision making</li> <li>■ Know and understand factors that go into developing key financial ratios and productivity metrics</li> <li>■ Review and recognize financial activity and patterns, in accounting software, and banking (lines of credit)</li> <li>■ Create reports to support the Annual Financial Audit</li> <li>■ Recognize and communicate the benefits of implementing efficient systems and processes for managing operations</li> <li>■ Utilize analysis tools (e.g., SWOT, Force Field Analysis, Urgent-Important Matrix, etc.) to identify weaknesses and strengths, and increase the management team's awareness of operations issues</li> <li>■ Perform data analysis and produce ad hoc data and reports as needed</li> <li>■ Monitor and ensure that all required data required for center operations and reporting is available; follow-up with teams/individuals for missing data as directed</li> </ul>



SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
<p>1. Ensure the development, integration, effective management, and sustaining of accurate and efficient systems, policies and procedures for the health center's operational functions (for example, clinical operations, clinical quality, risk management, and compliance and regulatory management, strategic and annual planning, operations reporting and management, decision support for financial and community health outcomes, etc.)</p>	<p>1</p>	<ul style="list-style-type: none"> <li>■ Learning the health center's organizational, operations and financial management processes, policies and tools and understand the importance of having efficient and effective systems and processes in place</li> <li>■ Understand and make basic interpretations about the health center's Key Performance Indicators (KPIs) and other metrics critical to managing operations successfully</li> <li>■ Learning how to read/interpret financial statements such as Cash Flow, Balance Sheet, Income Statements, and Retained Earnings Statement</li> <li>■ Possess basic knowledge about Generally Accepted Accounting Principles (GAAP)</li> <li>■ Learning about the processes involved in conducting the Annual Financial Audit and the role played by Operations</li> <li>■ Learning about policies, procedures, regulations, laws, and compliance requirements of the health center</li> <li>■ Seek guidance as needed</li> </ul>

SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
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2. Work collaboratively with providers and clinical leaders to ensure the efficient and effective daily operations of the clinical practices including staffing, patient management/ throughput, policies and procedures, scheduling, labs, specialty practices and referrals, etc.

5

- Create new opportunities to improve existing operating systems to enhance their efficiency and effectiveness
- Anticipate and predict future trends and benchmark best practices are up to date and implement regulatory related processes for adherence purposes
- Actively engage with and exhibit executive presence within local, state, regional, national organizations and partner with these organizations to improve clinical and non-clinical operations
- Automate administrative processes and focus on analysis to support decision-making for continuous alignment
- Inspire others and serve as the historian/ “storyteller” regarding the importance of process improvement and its linkage to meeting the organization’s mission, vision, and values

4

- Conduct frequent touchpoints with management and staff to understand what is needed to continuously improve organizational efficiency and effectiveness
- Prepare and present oral/written reports and presentations to stakeholders and leadership addressing challenges
- Monitor key performance indicators to evaluate the progress of programs or projects in achieving goals
- Demonstrate knowledge and application of process mapping and implementing process improvement strategies to obtain desired outcomes
- Work collaboratively with managers to address inconsistencies and reduce redundancies for desired optimization and outcomes
- Improve efficiency and overall operations of service lines across multiple locations
- Serve as a change agent and lead system transformation activities

SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
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2. Work collaboratively with providers and clinical leaders to ensure the efficient and effective daily operations of the clinical practices including staffing, patient management/ throughput, policies and procedures, scheduling, labs, specialty practices and referrals, etc.

3

- Ensure that financial, clinical, human resources and administrative operations are continuously aligned and improved
- Ensure that staffing schedules/templates promote reliable and effective operations, including the fair management of employee time-off
- Understand process mapping and have a working knowledge of process improvement techniques
- Engage staff in the identification of people and process barriers to the achievement of goals, and facilitate intra and extra departmental teams in the development and implementation of creative and effective solutions (e.g., workflows, process improvement, staffing, etc.)
- Utilize effective project management techniques to lead the development and implementation of assigned projects and programs
- Available to staff and approachable, so that issues are brought forward
- Continuously provide feedback and training to keep staff up to date with operational changes

2

- Ensure that all schedules/templates are open and available to providers and patients to help assure that revenue/visit/procedure targets can be met to achieve health center revenue goals
- Develop and present monthly data reports to show successes and areas needing improvement
- Possess basic knowledge of the health center's administrative operations and how the operations function supports/aligns with administrative activities (human resources, information technology, etc.)

SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
<p>2. Work collaboratively with providers and clinical leaders to ensure the efficient and effective daily operations of the clinical practices including staffing, patient management/ throughput, policies and procedures, scheduling, labs, specialty practices and referrals, etc.</p>	<p>1</p>	<ul style="list-style-type: none"> <li>■ Learning how policies and procedures align with departments and staff roles in the health center</li> <li>■ Participate in meetings, forums, surveys, etc., to share issues and/or challenges</li> <li>■ Learning organizational financial and administrative operations</li> <li>■ Aware of the importance of aligning financial and administrative operations to advance health center goals</li> </ul>
<p>3. Collaborate with executive leadership to identify ways to support the health center's mission, vision, values, and goals through effective talent management, including recruiting, hiring and retention strategies, succession planning, career laddering, orientation/ onboarding, training/ mentoring, professional development, and performance/ competency assessment and recognition.</p>	<p>5</p>	<ul style="list-style-type: none"> <li>■ Receive regular invitations to the department's operations meetings and provide support and innovative approaches toward improving other departmental operations</li> <li>■ Exemplify established organizational values and behaviors</li> </ul>
	<p>4</p>	<ul style="list-style-type: none"> <li>■ Ensure operations staff are involved with external industry and professional organizations, encouraging leadership and staff development</li> <li>■ Communicate feedback to staff in ways that motivate attitude, skill and behavior improvements</li> <li>■ Challenge key staff members to grow professionally and personally, through more challenging expectations and assignments</li> <li>■ Partner with key leadership and management to optimize recruitment and create a "best place to work" culture</li> </ul>

SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
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3. Collaborate with executive leadership to identify ways to support the health center’s mission, vision, values, and goals through effective talent management, including recruiting, hiring and retention strategies, succession planning, career laddering, orientation/ onboarding, training/ mentoring, professional development, and performance/ competency assessment and recognition.

3

- Maintain favorable staff culture and workplace
- Skilled at hiring and developing a competent team of professionals requiring minimal supervision and interaction
- In collaboration with HR, ensure the quality of the providers and clinical staff, including establishing qualifications & credentials, recruiting, development of compensation plans and contracts for providers; work with providers and HR to monitor and ensure maintenance of all required licenses and certifications
- Collaborate with HR to create programs that identify staff members for career laddering and/or succession planning opportunities
- Apply evidenced-based principles of management, leadership and supervision of others

2

- Prefer hands-on management, frequently engaged in close supervision and training of new leadership or management team members
- Learning how to apply evidence-based principles of management, leadership and supervision other

1

- Able to articulate the mission, vision, and values of the health center and the role of the operations team in assuring services are available to those in need
- Focus on major daily staff management activities, seek advice for complex situations
- Apply basic principles of management, leadership and supervision of others

SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
<p>4. Ensure compliance with employment, benefits, insurance, safety, and other employment laws, regulations, and requirements; and the development and implementation of policies and procedures to ensure ongoing compliance.</p>	<p>5</p>	<ul style="list-style-type: none"> <li>■ Lead the development of innovative workforce staffing models in collaboration with local, state, national associations</li> <li>■ Demonstrate expertise in insurance/liability contracts, Federal Torts Claims Act (FTCA)</li> <li>■ Demonstrate experience and expertise with labor contract negotiations, Independent Physician Association (IPA)/bargaining agreements, conflict resolution process, in a nonprofit/healthcare environment</li> <li>■ Serve as an executive champion for establishing a culture of employee safety</li> </ul>

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<p>4</p>	<ul style="list-style-type: none"> <li>■ Monitor and analyze financial data and utilize for decisions regarding FTEs, staffing and operational budget</li> <li>■ Work with the Executive Team to establish an annual operating and capital budget, demonstrating fiscal responsibility through meeting budget targets</li> <li>■ Develop a staffing model in partnership with Human Resources, Finance and Clinical departments that aligns with the organization's strategic goals and ensure that hiring practices are in line with the model</li> <li>■ Have good understanding of insurance/ liability coverage, contract language and bargaining agreements</li> <li>■ In collaboration with senior leaders, promote a culture of employee safety</li> </ul>
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SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
<p>4. Ensure compliance with employment, benefits, insurance, safety, and other employment laws, regulations, and requirements; and the development and implementation of policies and procedures to ensure ongoing compliance.</p>	 <p>3</p>	<ul style="list-style-type: none"> <li>■ Comply with all staffing-related grant requirements (including Section 330, state, local and foundation) and Health Resources and Services Administration (HRSA) mandates</li> <li>■ Partner with CFO on developing/presenting budgetary needs to CEO/Executive Team and the Board of Directors</li> <li>■ Connect with department leaders regularly to ensure consistent operations and gauge their need for any further staff members or resources</li> <li>■ Allocate appropriate levels of staff to fulfill the grant requirements and ensure its success</li> <li>■ Possess basic understanding of relevant employment laws and regulations and can identify areas of potential risk and non-compliance</li> <li>■ Knowledge of insurance/ liability coverage, contract language and bargaining agreements</li> <li>■ Know payroll management systems, policies and procedures around schedules/overtime, time and attendance, exemption status, time off</li> <li>■ Anticipate all supplemental needs (marketing and outreach, printing, equipment, etc.)</li> <li>■ In collaboration with health center leaders, ensure the safety of all employees and maintain compliance with current safety related regulations and laws (e.g., Occupational Safety and Health Administration (OSHA), Centers for Disease Control (CDC), etc.)</li> </ul>

SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
<p>4. Ensure compliance with employment, benefits, insurance, safety, and other employment laws, regulations, and requirements; and the development and implementation of policies and procedures to ensure ongoing compliance.</p>		<ul style="list-style-type: none"> <li>■ Collaborate with department heads to determine departmental needs to fulfill the requirements of the grant or organizational programs</li> <li>■ Communicate budget needs each fiscal year allocating enough funding to cover staffing resources</li> <li>■ Aware of relevant employment and safety laws and regulations and may require additional training or support to effectively ensure compliance</li> <li>■ Learning about how safety issues impact employee engagement and satisfaction</li> </ul>
		<ul style="list-style-type: none"> <li>■ Approve basic staffing needs and resources based on clinical needs, grant or program requirements</li> <li>■ Learning about employee safety regulations and laws</li> </ul>
<p>5. Ensure cost-effective purchase/leasing, utilization, maintenance, and storage of equipment, supplies, and facilities; establishes efficient systems for requests, approvals, inventory and maintenance.</p>		<ul style="list-style-type: none"> <li>■ Recognized as an expert in managing lease agreements/contracts; supplier contracts; inventory management, financing/real-estate, bulk/group purchasing agreements</li> <li>■ Participate in relevant committees, associations and purchasing networks</li> </ul>
		<ul style="list-style-type: none"> <li>■ Conduct regular assessments of procurement processes to identify opportunities for cost savings, such as bulk purchasing or lease negotiations</li> <li>■ Develop and implement efficient systems for requesting and approving equipment, supplies, and facilities to ensure timely acquisition and utilization</li> <li>■ Develop and implement policies and procedures for the appropriate utilization and maintenance of equipment, supplies, and facilities to extend their useful life and minimize downtime</li> <li>■ Ensure that all purchases and leases are made in compliance with applicable laws and regulations, such as competitive bidding requirements</li> </ul>



SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
<p>5. Ensure cost-effective purchase/leasing, utilization, maintenance, and storage of equipment, supplies, and facilities; establishes efficient systems for requests, approvals, inventory and maintenance.</p>	<p>3</p>	<ul style="list-style-type: none"> <li>■ Understands scope of role and processes in developing and approving budget items</li> <li>■ Facilitate inventory management and safe storage of equipment in partnership with Purchasing, Clinical and Facilities departments</li> <li>■ Assure health center staff have access to the equipment, supplies and services required to achieve productivity, efficiency, quality, and other operating goals</li> <li>■ Establish clear guidelines for requesting and approving equipment, supplies, and facilities, including criteria for prioritization and approval levels</li> <li>■ Monitor and track expenses related to equipment, supplies, and facilities to identify opportunities for cost savings and ensure that expenditures are within budget</li> </ul>
	<p>2</p>	<ul style="list-style-type: none"> <li>■ Promote cost efficiency, par values and inventory management, ordering efficiency standards with staff and clinic teams</li> <li>■ Identify the need for supplies and equipment based on understanding of current demands, inventory and operating condition</li> </ul>
	<p>1</p>	<ul style="list-style-type: none"> <li>■ Understand scope of role and process in developing and approving budget items</li> <li>■ Possess basic knowledge and understanding of inventory and facility management and budgeting</li> </ul>

SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
<p>6. Work collaboratively with senior leaders, department/functional leaders, providers, clinical and non-clinical staff to establish productive and collegial working relations, reduce conflict, and develop and implement policies and resources to increase job satisfaction and tenure and reduce turnover.</p>	<p>5</p>	<ul style="list-style-type: none"> <li>■ Educate decision makers, seek to answer their questions and provide access to health center outcomes</li> <li>■ Proactively seek out opportunities to build relationships and establish open lines of communication with leaders and staff across the organization</li> <li>■ Act as a role model for collaborative behavior, demonstrating respect and empathy for colleagues, actively listen to their input and feedback, and value their contributions</li> <li>■ Build trust and credibility with colleagues through consistent and transparent communication, follow-through on commitments, and accountability for results</li> <li>■ Recognize and reward teamwork and collaboration, celebrate successes and highlight examples of positive collaboration across the organization</li> <li>■ Skilled in conflict resolution and mediation</li> <li>■ Recognized as a thought leader in the area of building high performing teams</li> </ul>

<p>4</p>	<ul style="list-style-type: none"> <li>■ Encourage open and honest communication among colleagues to prevent conflicts from escalating and ensure that conflicts are addressed in a timely and respectful manner</li> <li>■ Lead by example; set the tone; create a culture of safety and positive work environment</li> <li>■ Knows how to delegate and support/encourage the teams in developing the culture that leads to better retention, job satisfaction and promotes healthy work relationships</li> <li>■ Promptly address any variations or deviations that are not directly aligned with the org mission, vision and values</li> <li>■ Lead workgroups to identify the key issues, collaborate with various stakeholders to prioritize the messaging and drive results</li> <li>■ Monitor and evaluate the effectiveness of policies and resources over time, adjust as needed to improve outcomes and achieve desired results</li> </ul>
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SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
<p>6. Work collaboratively with senior leaders, department/functional leaders, providers, clinical and non-clinical staff to establish productive and collegial working relations, reduce conflict, and develop and implement policies and resources to increase job satisfaction and tenure and reduce turnover.</p>	 <p>3</p>	<ul style="list-style-type: none"> <li>■ Work collaboratively with colleagues to develop and implement policies and resources that address identified areas for improvement and promote employee satisfaction and retention</li> <li>■ Engage in active listening and empathetic communication to understand different perspectives and facilitate resolution of conflicts</li> <li>■ Monitor regular assessments of employee satisfaction, turnover rates, and other key performance indicators to identify areas for improvement</li> <li>■ Use technology and other tools to facilitate communication and collaboration among colleagues, especially in virtual or remote work environments</li> <li>■ Ensure that policies and resources are communicated effectively to all colleagues and that they are trained on their implementation and use</li> <li>■ Establish regular channels of communication with colleagues, including regular staff meetings, town hall sessions, and one-on-one conversations</li> <li>■ Articulate the factors that influence the environment, the strengths and weaknesses, and key stakeholders who contribute to the daily movement</li> <li>■ Ensure employees have opportunities to provide honest, open feedback and experience fair management practices (e.g., employee satisfaction measures, dispute mediation and resolution, discipline, and termination)</li> <li>■ Work with colleagues to identify the root causes of conflicts and develop strategies to address them proactively</li> <li>■ Promote teamwork and good morale among the medical and support staff</li> <li>■ Promote the utilization of proven techniques to increase empathy, understanding and cooperation among intra and interdisciplinary team members and departments (e.g., cross-training, shadowing/observation, team building, cross-departmental planning, etc.)</li> <li>■ Use clear and concise language to communicate expectations, policies, and other important information to colleagues</li> </ul>

SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
<p>6. Work collaboratively with senior leaders, department/functional leaders, providers, clinical and non-clinical staff to establish productive and collegial working relations, reduce conflict, and develop and implement policies and resources to increase job satisfaction and tenure and reduce turnover.</p>	<p>2</p>	<ul style="list-style-type: none"> <li>Communicate in a manner that fosters staff initiative and learning, and models a discourse that discourages off-topic, rambling, self-aggrandizing, and hidden-agendas</li> </ul>
	<p>1</p>	<ul style="list-style-type: none"> <li>Conduct/participate in team leadership meetings with respect for participants</li> </ul>
<p>7. Oversee establishment of an environment of care/culture of safety (e.g., patient safety, engagement and satisfaction assessment, goal setting and plans for improvement.</p>	<p>5</p>	<ul style="list-style-type: none"> <li>Direct and drive the implementation, execution, and hardwiring of evidence-based practices to improve physicians, staff, leaders, and patient/family experiences, including appropriate staff in the journey</li> <li>Implement strategies that drive and support patient and caregiver experience improvement initiatives for targeted areas, in line with the strategic plan and the annual operation plan</li> <li>Support organizational committees to drive patient experience initiatives and ensure organizational alignment</li> <li>Serve as a champion to develop a patient/patient caregiver advisory board</li> <li>Serve as an executive champion for establishing a culture of patient and visitor safety</li> <li>Contribute to the body of knowledge concerning Environment of Care (EOC) and establishing a culture of safety in health centers</li> </ul>

SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
<p>7. Oversee establishment of an environment of care/culture of safety (e.g., patient safety, engagement and satisfaction assessment, goal setting and plans for improvement.</p>	<p>4</p>	<ul style="list-style-type: none"> <li>■ Collaborate with leadership and staff, to identify and mitigate barriers and improve processes as identified through patient complaints and safety related incidents</li> <li>■ Lead establishment of a culture of care, based on Environment of Care (EOC) standards</li> <li>■ Participate in the development of programs and services that address specific aspects of the patient and staff experiences within his/her assigned area of responsibility</li> <li>■ In collaboration with clinical and senior leadership, promote a culture of safety with the goal of striving toward zero cases of patient and visitor harm</li> </ul>

SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
<p>7. Oversee establishment of an environment of care/culture of safety (e.g., patient safety, engagement and satisfaction assessment, goal setting and plans for improvement).</p>	<p>3</p>	<ul style="list-style-type: none"> <li>■ Serve as a key resource to management, staff, providers, and stakeholders to improve organizational engagement, leadership, and partnerships</li> <li>■ Use Specific, Measurable, Achievable, Relevant, Time-bound (SMART) goals and other strategies to determine areas of improvement for staff productivity, and as a means to celebrate successes</li> <li>■ Attend workshops and conferences to learn more, find new metrics and opportunities, and exchange information with those on the team</li> <li>■ Lead evaluation of health center’s status on environment of care standards and establish operational goals and activities directed at improving them (e.g., safety, security, hazardous materials, life safety, emergency preparedness, clinical equipment, and utilities)</li> <li>■ Introduce patient experience strategic imperatives during new hire onboarding processes including, but not limited to orientation with ongoing follow up</li> <li>■ Create and maintain relationships between the health center and local community leaders to help expand the reach of the health center</li> <li>■ Ensure compliance with addressing patient complaints and concerns to improve process improvements</li> <li>■ In collaboration with clinical and other health center leaders, support patient and visitor safety and maintenance of compliance with current safety-related regulations and laws</li> <li>■ Facilitate the implementation and maintenance of systems to track and monitor patient complaints and concerns</li> </ul>

SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
7. Oversee establishment of an environment of care/culture of safety (e.g., patient safety, engagement and satisfaction assessment, goal setting and plans for improvement).	2	<ul style="list-style-type: none"> <li>■ Utilize productivity reports to measure employee productivity levels on a regular basis (e.g., weekly, monthly)</li> <li>■ Monitor and report on poor patient experience as individual complaints arise and on a regular basis (e.g., weekly, monthly)</li> <li>■ In conjunction with the Medical Director and Leadership, implement and drive strategies that enhance physician and staff engagement</li> <li>■ Learning and applying strategies around patient experience methodologies and tactics</li> <li>■ Learning about how safety issues impact patient engagement and satisfaction</li> <li>■ Develop reports and analyses concerning the health center's compliance with Environment of Care (EOC) standards and culture of safety</li> </ul>

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1	<ul style="list-style-type: none"> <li>■ Learning about the importance of patient engagement and satisfaction to health center profitability, reimbursement, and value-based care</li> <li>■ Learning about patient and visitor safety regulations and laws</li> <li>■ Identify process needs based on each job description or function to help improve productivity and increase staff and patient engagement and satisfaction without complicating current processes</li> <li>■ Learning about Environment of Care (EOC) as it relates to a culture of safety and accreditation standards</li> <li>■ Becoming familiar with staff processes that impact patient engagement</li> </ul>
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SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
<p>8. Plan, organize, and evaluate various projects, programs and services involving diverse administrative operations; oversee or manage specific projects, programs and/or services, such as Federally Qualified Health Center (FQHC) requirements.</p>	<p>5</p>	<ul style="list-style-type: none"> <li>■ Subject matter expert of program and project planning</li> <li>■ Ability to set up systems to support any project across the continuum</li> <li>■ Serve as an advocate for the community health center movement impacting policy at the local, state and national levels</li> <li>■ Influence public and private policy, regulations, and accreditation standards through participation in task forces, review committees, onsite review, think tanks, etc.</li> </ul>
	<p>4</p>	<ul style="list-style-type: none"> <li>■ Demonstrate a deep understanding of health center issues and prioritize needs</li> <li>■ Identify members and lead internal workgroups in responding to external opportunities, and certification or accreditation requirements/ compliance, such as Patient-Centered Medical Home (PCMH), The Joint Commission (TJC), Health Resources and Services Administration (HRSA) On Site Visit (OSV), 340B Recertification, etc.</li> <li>■ Work with grants manager to pursue other avenues of accreditation, funding, or other opportunities</li> </ul>



SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
<p>8. Plan, organize, and evaluate various projects, programs and services involving diverse administrative operations; oversee or manage specific projects, programs and/or services, such as Federally Qualified Health Center (FQHC) requirements.</p>	<p>3</p>	<ul style="list-style-type: none"> <li>■ Evaluate opportunities and make/support recommendations for growth or redesign of clinical practices and services in keeping with the mission and strategic plan of the health center</li> <li>■ Work closely with C-Suite/senior management and contractors to develop specifications, timelines, RFPs, and assure that team members/patients have resources needed for successful and on-time development, implementation/launch of products and services</li> <li>■ Contribute to the development of construction project plans to help assure efficient and cost-effective movement of people, equipment and supplies, and utilization of space</li> <li>■ Identify, assemble and manage teams best suited to work on various projects and programs identify and secure third-party talent as needed</li> <li>■ Report the status and outcomes of projects/ programs and impact on operations to key internal and external stakeholders</li> <li>■ Support and/or lead aspects of the health center’s response to external opportunities, and certification or accreditation requirements/ compliance, such as Patient Centered Medical Home (PCMH), The Joint Commission (TJC), Health Resources and Services Administration (HRSA) On Site Visit (OSV), 340B Recertification, etc.</li> <li>■ Work closely with the CFO, manage capital equipment and facilities budgets &amp; expenditures, to include oversight of requests, procurement, storage, utilization, and maintenance of capital expenditures, IT, renovations, constructions, equipment, etc.</li> <li>■ Selectively join community groups that focus on improving health care reimbursement and health improvement related issues to stay abreast of current programmatic and operations trends and opportunities</li> <li>■ Have a good understanding of state and federal accrediting body Federally Qualified Health Center (FQHC) requirements</li> <li>■ Monitor health care trends and opportunities for funding that can help the health center better serve its patients and communities and improve financial performance</li> </ul>

SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
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8. Plan, organize, and evaluate various projects, programs and services involving diverse administrative operations; oversee or manage specific projects, programs and/or services, such as Federally Qualified Health Center (FQHC) requirements.

2

- Explore current relationships and begin to establish personal connections between the health center and local, state, national leaders
- Contribute to the health center’s response to external opportunities, and certification or accreditation requirements/compliance, such as Patient-Centered Medical Home (PCMH), The Joint Commission (TJC), Health Resources and Services Administration (HRSA) On Site Visit (OSV), 340B Recertification, etc.
- Support completion of assigned tasks within a larger project

1

- Learning the history of the Community Health Center movement and how it intersects with the current U.S. Healthcare system
- Learning about the role the health center plays in providing community health care
- Learning about public and private health center certifications and accreditation requirements and opportunities
- Gather requested information and reports to support various programs and projects

SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
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9. Develop and implement comprehensive business continuity strategies and plans to effectively prepare, respond to, and recover from disruptions or disasters.

5

- Participate in regional or national networks and forums focused on disaster planning and response to share best practices, lessons learned, and stay updated on emerging trends
- Demonstrate exceptional poise, remaining composed and confident in high-pressure situations
- Exhibit decisive leadership, making timely and well-informed decisions while considering the long-term implications
- Possess strong situational awareness, quickly assessing the crisis and determining the appropriate course of action
- Communicate effectively with all stakeholders, conveying a sense of competence and reassurance
- Ability to lead and inspire the team, fostering a cohesive and resilient response to the crisis

4

- Maintain a culture of continuous improvement and vigilance regarding disaster planning, fostering a proactive and prepared mindset across the health center
- Establish partnerships with local emergency management agencies, community organizations, and healthcare networks to enhance coordination and support during disasters or emergencies
- Demonstrate extensive experience in crisis management and have likely handled multiple complex and high-stakes situations
- Display exceptional composure, remaining focused and level-headed amidst chaos and uncertainty
- Provide clear direction and guidance to their team, inspiring confidence and motivation
- Consider multiple perspectives and potential outcomes before making critical decisions
- Actively engage with stakeholders, keeping them informed and involved in the crisis response

SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
<p>9. Develop and implement comprehensive business continuity strategies and plans to effectively prepare, respond to, and recover from disruptions or disasters.</p>	<p>3</p>	<ul style="list-style-type: none"> <li>■ Stay updated on the latest guidelines, regulations, and best practices related to disaster planning and incorporating them into staff training and education programs</li> <li>■ Develop a comprehensive Business Continuity Plan (BCP) that outlines strategies, procedures, and protocols to ensure the health center can continue essential operations during and after a disruption or disaster</li> <li>■ Assess the potential impact of disruptions or disasters on these critical functions, such as patient care, IT systems, supply chain, and revenue streams</li> <li>■ Test and validate the BCP through regular drills, tabletop exercises, and simulations to identify areas for improvement and enhance preparedness</li> <li>■ Oversee the conduct of thorough risk assessments to identify potential threats, hazards, and vulnerabilities that could impact the health center's operations</li> </ul>
	<p>4</p>	<ul style="list-style-type: none"> <li>■ Collaborate with relevant stakeholders, including IT departments, facilities management, and emergency response teams, to ensure a comprehensive approach to risk mitigation</li> <li>■ Exhibit a solid ability to stay calm and provide effective leadership during a crisis and can draw on past experiences to guide their decision-making</li> <li>■ Effectively communicate and delegate responsibilities, ensuring that resources are allocated appropriately, and actions are taken promptly</li> </ul>

SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
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9. Develop and implement comprehensive business continuity strategies and plans to effectively prepare, respond to, and recover from disruptions or disasters.

2

- Demonstrate a growing ability to stay calm under pressure and provide leadership during a crisis
- Display a willingness to take initiative and make decisions, and seek input from others when needed
- Actively participate in crisis preparedness efforts, become familiar with emergency response protocols, and seek guidance from more experienced leaders
- Define roles and responsibilities of key personnel during a crisis, including emergency response teams, incident management teams, and communication coordinators
- Establish communication protocols to keep staff, patients, and stakeholders informed during emergencies
- Coordinate with suppliers, vendors, and service providers to ensure a robust supply chain and contingency plans for critical resources during disruptions

1

- Demonstrate knowledge of emergency management procedures, key stakeholders and rely on established protocols and guidance from higher-level leaders or experts within the organization
- Seek support and guidance from experienced colleagues and collaborate closely with other members of the crisis management team

## V. GRANTS MANAGEMENT

*Managing public and private funder relationships, planning and operational tasks associated with grant applications and management of grant funds and other resources; applying efficient and effective strategies to maximize grant impact and achievement of the grant goals. Includes effective interpersonal and relationship management skills while interacting with public and private grant organizations and funders; and working closely with the health center finance team to ensure compliance with all applicable public and private grant requirements and regulations.*

SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
<p>1. Facilitate the identification/creation of grant funding opportunities to support the health center programs and operations and oversee development of grant applications, submissions and tracking of awards.</p>	 <p>5</p>	<ul style="list-style-type: none"> <li>■ Participate in state or national grant creation opportunities</li> <li>■ Advocate for health center funding opportunities to address specific, widespread concerns</li> <li>■ Innovate efficient submission, assessment, and progress monitoring of grants and other funding activities across health centers</li> <li>■ Understand outcomes of the utilization of grant funds across health centers and make recommendations to improve efficiency in utilization or funding</li> <li>■ Lead or coordinate cross-health center collaboration and networking to establish best practices for utilization of grant funds for defined issues</li> </ul>
	 <p>4</p>	<ul style="list-style-type: none"> <li>■ Conduct program evaluation, including monitoring and assessing awardee performance, and establishing performance measures</li> <li>■ Initiate and/or recommend the need for audits</li> <li>■ Communicate the availability of appropriate grant/funding opportunities to stakeholders to support health center goals, proactively</li> <li>■ Facilitate the completion of cross-departmental grant/funding applications</li> <li>■ Collaborate with CFO to develop grant/funding applications and negotiate terms and conditions of grants/assistance awards to include costs, schedules, and oversight responsibilities of leadership</li> </ul>

SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
<p>1. Facilitate the identification/creation of grant funding opportunities to support the health center programs and operations and oversee development of grant applications, submissions and tracking of awards.</p>	<p>3</p>	<ul style="list-style-type: none"> <li>■ Develop or curate a list of funding sources that are frequently monitored for appropriate grant opportunities</li> <li>■ 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</li> <li>■ Monitor, assess, and ensure the health center qualifies for all terms and conditions of prospective awards; may be completed in collaboration with other senior leaders</li> </ul>
	<p>2</p>	<ul style="list-style-type: none"> <li>■ Research grant and funding opportunities based upon a thorough knowledge of the health center's strategic and organizational goals, objectives, programs and desired outcomes</li> <li>■ Maintain a schedule of proposal submissions, renewal and reporting dates/deadlines to ensure timely responses for the maximum generation of funds</li> </ul>
	<p>1</p>	<ul style="list-style-type: none"> <li>■ Research and explore training opportunities to increase knowledge of available grant funding opportunities for the health center</li> </ul>

SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
2. Collaborate with finance team and department/clinic leaders regularly to ensure that budgets are accurate and up to date.	5	<ul style="list-style-type: none"> <li>■ Collaborate with potential subrecipients of grant funds, establish partnerships, Memorandum of Understanding (MOU) and tracking of use of funds</li> <li>■ Understand the timeline of appropriate use of budget funds and drawdowns in relation to the grant program plan</li> </ul>
	4	<ul style="list-style-type: none"> <li>■ Integrate strategic framework into budget planning</li> <li>■ Forecast utilization of cash and communicate variances to key stakeholders on a consistent basis</li> <li>■ Work with health center leaders to articulate rationales for budget variances from the originally filed budgets in their department/clinic</li> <li>■ Provide the data and challenge department/clinic leaders to articulate trends and causes of variances</li> <li>■ Implement software solutions or technological efficiencies that compare actual results to budget without using Excel formulas and manual manipulation of data</li> </ul>
	3	<ul style="list-style-type: none"> <li>■ Ensure health center leaders understand their roles and responsibilities in the proper planning and management of budget against results, including all subrecipient partners</li> <li>■ Engage in regular analysis of budget to actual use results and follow up/resolve discrepancies</li> <li>■ Publish key performance indicators that compare actual results to budget, i.e., revenue/visit, days cash on hand, operating margin, etc.</li> <li>■ Create processes for early detection of deviation from utilization stated in the original budget</li> </ul>



SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
<p>2. Collaborate with finance team and department/clinic leaders regularly to ensure that budgets are accurate and up to date.</p>	<p>2</p>	<ul style="list-style-type: none"> <li>■ Actively seek out and engage in learning opportunities concerning budgeting trends and strategies</li> <li>■ Build a budget roadmap; identify needs by department, funding source, clinic, etc.</li> <li>■ Project patient service revenue based on expected visits and care teams</li> </ul>
	<p>1</p>	<ul style="list-style-type: none"> <li>■ Have a basic understanding of grant budgets</li> <li>■ Explore training opportunities to gain knowledge on grant budgeting and funds management</li> <li>■ Collaborate with internal partners to understand their budget needs</li> </ul>
<p>3. Appropriately manage all private donor activity, including proposal development, tracking and monitoring and communications (individual/corporate/private foundation/other).</p>	<p>5</p>	<ul style="list-style-type: none"> <li>■ Create partnerships and develop robust relationships with external customers, recipients, and awardee community to clarify, interpret, and resolve issues connected with privately awarded funds</li> <li>■ Develop donor communication materials including the Annual Report, donor appeals, stewardship materials, and other projects that are in alignment with health center strategic goals</li> </ul>
	<p>4</p>	<ul style="list-style-type: none"> <li>■ Write well-written, well-conceived, and coordinated cross department proposals for new and continued funding from foundations, corporations, and government agencies</li> <li>■ Proactively produce internal reports for health center communications and Board of Directors</li> </ul>

SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
3. Appropriately manage all private donor activity, including proposal development, tracking and monitoring and communications (individual/corporate/private foundation/other).	3	<ul style="list-style-type: none"> <li>■ Maintain awareness of and cultivate relationships with private donors and funding opportunities to support the strategic goals of the health center</li> <li>■ Communicate private donor funding opportunities to health center leadership, as appropriate</li> <li>■ Manage or support the development of proposals</li> <li>■ Manage or coordinate required foundation and corporate funder communications, as appropriate</li> <li>■ Manage or contribute to internal reports (staff and Board of Directors) as appropriate/requested</li> </ul>
	2	<ul style="list-style-type: none"> <li>■ Represent the organization in a knowledgeable and professional manner on donor tours, site visits, and other public gatherings</li> <li>■ Work with team members to support the development of proposals and reports, as assigned</li> </ul>
	1	<ul style="list-style-type: none"> <li>■ Conduct research for funding opportunities utilizing a thorough comprehension of organizational goals, objectives, programs, and desired outcomes</li> <li>■ Facilitate awareness of potential funding sources with health center leaders/make introductions as appropriate</li> </ul>
4. Communicate status and progress of grant-related activities with grantors/funders and stakeholders in an accurate and engaging manner.	5	<ul style="list-style-type: none"> <li>■ Serve as liaison between the Government and awardee organization</li> <li>■ Maintain a broad understanding of health center utilization of various forms of grants and funding, barriers and facilitators to implementation and outcomes</li> <li>■ Facilitate/lead the conduct of cross-organizational surveys and other research to make recommendations for policy and regulatory changes related to grant funding</li> </ul>

SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
4. Communicate status and progress of grant-related activities with grantors/ funders and stakeholders in an accurate and engaging manner.	4	<ul style="list-style-type: none"> <li>■ Communicate health center eligibility for grant funding, based on established eligibility criteria, such as competitive rating factors to key stakeholders</li> <li>■ Maintain awareness of and communicate the status of health center grants and funding with all stakeholders, aligning communication and methods with their level of interest and need to know</li> <li>■ Implement systems to consolidate and manage reporting of grant activity</li> <li>■ Articulate clearly and persuasively the impacts of grants and funding in the support of health center operations, strategic programs and services</li> </ul>

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3	<ul style="list-style-type: none"> <li>■ Identify and articulate environmental and other factors that influence grant implementation, progress, and outcomes</li> <li>■ Analyze and report findings and recommendations at regular intervals (e.g., monthly, quarterly, annual, etc.) to funders, health center administration and Board of Directors (based on reporting requirements and need to know)</li> <li>■ Work cooperatively with health center leaders to identify funding solutions to help resolve barriers to providing needed services</li> <li>■ Work with internal leaders to identify key messages to report to stakeholders regarding grant/funding activity relating to health center operations</li> <li>■ Clarify information/reporting requirements with internal and external stakeholders concerning health center operations</li> <li>■ Articulate clearly and persuasively the impacts of grants and funding in the support of health center operations, strategic programs and services</li> </ul>
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SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
4. Communicate status and progress of grant-related activities with grantors/funders and stakeholders in an accurate and engaging manner.	2	<ul style="list-style-type: none"> <li>■ Participate in workgroups to help identify key issues to report</li> <li>■ Support the development of grant/funding related communications as requested</li> <li>■ Assemble and report information needed to generate progress reports for stakeholders, as requested</li> </ul>
	1	<ul style="list-style-type: none"> <li>■ Able to discuss how grant funding supports the strategic goals of the health center with key stakeholders in an efficient and credible manner</li> </ul>

## VI. BUSINESS DEVELOPMENT

*Facilitating successful stakeholder engagement, planning, funding, development, implementation and/or ongoing management of strategic or urgent projects or programs while meeting time, budget, health care outcome goals, regulatory and grant requirements. Includes utilizing successful strategies for navigation through both internal and external organizational challenges and politics to achieve the desired programmatic, financial and community health outcomes.*

SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
<p>1. Establish, maintain, and evaluate health center readiness for business development including the maintenance of accurate and efficient operations; includes cultivation of mutually beneficial partnerships/engagements with local community organizations, vendors and other business partners; and maintaining current knowledge of the health care industry.</p>	 <p>5</p>	<ul style="list-style-type: none"> <li>■ Utilize broad knowledge of the health care industry to support the completion of the health center's needs assessment and identification of service and product development opportunities</li> <li>■ Collaborate with community organizations and local and regional collectives focused on health care and social determinants of health to engage the health center in opportunities to develop new or improve existing programs, services and mutually beneficial partnerships</li> <li>■ Identify and evaluate effectiveness of new collaborative relationships with health associations and government agencies such as National Association of Community Health Centers (NACHC), state Primary Care Association (PCA), and Health Resources and Services Administration (HRSA), respectively; and others to support the overall growth of the health center with national health industry standards</li> <li>■ Analyze local health data to identify the need for services and programs</li> <li>■ Communicate with external stakeholders to ensure that services offered are reflective of community needs and collaborative with community services</li> <li>■ Identify mission-centric opportunities for stakeholder engagement, community outreach, and specific operational service lines while ensuring process focus on strategic business drivers including growth, service, quality, people, financial health, and key internal and external relationships</li> </ul>

SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
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1. Establish, maintain, and evaluate health center readiness for business development including the maintenance of accurate and efficient operations; includes cultivation of mutually beneficial partnerships/engagements with local community organizations, vendors and other business partners; and maintaining current knowledge of the health care industry.

4

- Lead the health center’s needs assessment, analyze results and present findings, including program and service recommendations, partnership outcomes, etc., to senior leadership and the Board of Directors
- In collaboration with the Chief Financial Officer (CFO), create efficient systems to collect, report, and analyze operations data to contribute to the Annual Financial Audit
- Maintain current knowledge of unique health center needs impacting health status and access to care
- Identify opportunities in the existing health center budget to invest in business development
- Proactively manage the financial health of existing programs and services to ensure community needs are met as new programs and services are developed and implemented
- Monitor patient engagement/satisfaction data for opportunities to improve existing or develop new programs and services
- Monitor health center care outcomes and quality for business development opportunities
- Participate in local community and health care organizations to identify opportunities for mutually beneficial collaborations/partnerships

3

- Work to maintain the health centers’ status as a Federally Qualified Health Center (FQHC) by ensuring the health center continually meets/exceeds Health Resources and Services Administration (HRSA) guidelines utilizing Uniform Data Systems (UDS) and other available quality measures
- Aware of local trends in health care outcomes, demographics and Social Determinants of Health (SDOH) and impact on business development
- Aware of health center data relating to patient engagement/satisfaction and care outcomes and understand their relationship to overall health center service offerings and quality

SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
<p>1. Establish, maintain, and evaluate health center readiness for business development including the maintenance of accurate and efficient operations; includes cultivation of mutually beneficial partnerships/engagements with local community organizations, vendors and other business partners; and maintaining current knowledge of the health care industry.</p>	<p>2</p>	<ul style="list-style-type: none"> <li>■ Understand the role that achieving and maintaining Federally Qualified Health Center (FQHC) status plays in health center readiness to take advantage of new business opportunities</li> <li>■ Understand how continually meeting or exceeding Health Resources and Services Administration (HRSA) guidelines utilizing Uniform Data Systems (UDS) and other available quality measures prepares the health center to invest in business development</li> <li>■ Contribute to data collection for market analysis</li> <li>■ Research areas of future health development and collaborates with health center leaders on how to expand access</li> <li>■ Aware of and occasionally attend local community health care collaborative events</li> <li>■ Gather information and develops reports to inform health center leadership on potential opportunities for improvement of existing or development of new programs and services</li> <li>■ Seek out people and resources that can help further the mission and service delivery of the health center</li> <li>■ Attend trainings, conferences, policy meetings, etc. to collaborate and learn community partnerships and create impactful advocacy for health center developments</li> </ul>
	<p>1</p>	<ul style="list-style-type: none"> <li>■ Learning about the local community health care needs and supporting organizations</li> <li>■ Learning about programs and services offered in the health center and other organizations that are customized to meet the needs of the local community</li> <li>■ Learning about federal health center guidelines and requirements and how they impact business development</li> <li>■ Learning of health center related associations and forming partnerships with integrated community services</li> </ul>

SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
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2. Lead the creation and management of business development and project plans that comprehensively and strategically target: the development and implementation of new and innovative programming; the improvement or expansion of existing programs, products, and services, locations/access points; and/or utilization of public & private innovation and technology grant funding opportunities aligned with the Federally Qualified Health Center mission and strategic plan.

5

- Demonstrate a deep understanding of the connection between mission, services offered by health centers and the communities served
- Cultivate active relationships with diverse communities, including those that are underserved and/or historically marginalized, for purposes of co-creating and co-designing content, programs, and events that resonate with diverse audiences
- Cultivate new, innovative funding sources for business development in collaboration with industry leaders
- Cultivate close relationships with grant/funding organizations and participation in professional networks to maintain awareness of and share upcoming public and private grant/funding opportunities to pursue innovative technology and programming
- Maintain deep awareness of new and innovative technology and approaches to improve efficiency and effectiveness of health center operations and service provision and share with health centers
- Guide the health center in fund raising efforts and garner community support for the new program or service, including major capital campaigns
- Champion new program/service line and innovation of existing programs and services based on deep knowledge of local and national industry trends in health care and demographics
- Identify and establish strategic and collaborative relationships with individuals and organizations with resources and influence to assist the health center in business development, such as federal and state organizations, funders/bankers/lenders, auditors, insurance providers, professional organizations, chambers of commerce, vendors and other healthcare and professional services organizations and industry networks



SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
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2. Lead the creation and management of business development and project plans that comprehensively and strategically target: the development and implementation of new and innovative programming; the improvement or expansion of existing programs, products, and services, locations/access points; and/or utilization of public & private innovation and technology grant funding opportunities aligned with the federally qualified health center mission and strategic plan.

4

- Integrate opportunities for new and innovative technology and approaches to improve efficiency and effectiveness of health center operations, clinical services, and communications with patients [e.g., telemedicine, biometric monitoring, EHR innovations, social media, electronic communications, Quick Response codes (QR codes), bar codes, etc.]
- Identify new and reengineer or eliminate ineffective programs/products/services in collaboration with senior leaders and as part of the health center’s ongoing strategic planning processes
- Facilitate executive team consideration of targeted public and private funding for innovative programming and services that create business development opportunities for the health center
- Determine metric thresholds for financially feasible services and
- Cultivate active relationships with diverse communities, including those that are underserved and/or historically marginalized, for purposes of co-creating and co-designing content, programs, and events that resonate with diverse audiences
- Understand financial business proposals for funding allocations from each contributing funding source including specially dedicated funds, grants funds (federal, private, etc.)
- Integrate health center growth and service line development into health center strategic plan
- Engage leaders across the health center in vetting/evaluating ideas for new or revamping existing programs or services; recommend course of action (“go – no go,” decisions)
- Examine current productivity levels and capacity for growth within the health center; delineate strengths and potential barriers
- In collaboration with the CFO and Board of Directors, identify creative sources of funding for new programs or services and/or the revamping of existing services

SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
<p>2. Lead the creation and management of business development and project plans that comprehensively and strategically target: the development and implementation of new and innovative programming; the improvement or expansion of existing programs, products, and services, locations/access points; and/or utilization of public &amp; private innovation and technology grant funding opportunities aligned with the federally qualified health center mission and strategic plan.</p>	<p style="text-align: center;">3</p>	<ul style="list-style-type: none"> <li>■ Collaborate with service line leaders on a regular basis to explore opportunities and create proposals for new and innovative services, technology, and service delivery</li> <li>■ Consider availability of innovation grants and funding opportunities when planning for business development</li> <li>■ In collaboration with key health center leaders, develop the key components of the business plan, including a description for the program or service and population served that clearly indicates how it supports the health center's overall strategic plan</li> <li>■ Seek opportunities to engage and create relationship with different sectors of the community to create dialogue and understand how the programs, services and resources offered by the health center can be modified to better meet their diverse needs</li> <li>■ Facilitate the provision of advanced decision support/information to the team developing existing or potential new programs and services</li> <li>■ Collaborate with finance and clinical leaders to develop proforma/financial projections and modify business plans as needed to meet strategic goals</li> <li>■ Provide reasonable budget projections on service expansion, capital development, and grant procurement that are consistent with past trends and compliant with Code of Federal Regulations (CFR) guidelines.</li> <li>■ Identify the need for and secure third-party contracts to support the development and/or implementation of the plan</li> <li>■ Establish operating thresholds for products and services and convene regularly with leaders of those services to review actual operating performance vs. budget</li> <li>■ Establish continuous performance improvement initiatives as the norm</li> </ul>

SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
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2. Lead the creation and management of business development and project plans that comprehensively and strategically target: the development and implementation of new and innovative programming; the improvement or expansion of existing programs, products, and services, locations/access points; and/or utilization of public & private innovation and technology grant funding opportunities aligned with the federally qualified health center mission and strategic plan.

2

- Support the development of business plans through conducting research and assembling reports
- Maintain awareness of technology innovations in health care operations and communications
- Understand the process for updating services to the health center’s scope of practice by following Health Resources and Service Administration (HRSA) Scope of Project guidelines
- Participate in activities/events with various/ and different sectors of the community to open channels of communication and understand the best ways to serve them
- Aware of service line opportunities and attends trainings to grow awareness of implementation processes of service delivery

1

- Learning about services and health care delivery provided at the health center
- Learning about technology innovations in health care operations and communications; may participate as a patient/consumer of health care
- Learning about the key components of business plans, how they relate to the health center strategic plan, and how they are developed and implemented
- Identify key stakeholders in the business development process
- Aware of the demographic, cultural and ethnic differences of the community served and ways to connect with them

SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
<p>3. Acquire and maintain external and internal business intelligence through market-based /competitor analysis of local, regional, and national healthcare trends (including services and payment), competitive threats, expansion opportunities and internal performance trends and strengths &amp; challenges; and deliver data-driven analyses to support actionable strategic direction of the health center.</p>	<p>5</p>	<ul style="list-style-type: none"> <li>■ Recommend strategic goals and metrics based on deep understanding of market trends and data</li> <li>■ Regularly conduct or review industry and market analyses seeking to identify trends, challenges, and changes that could or will impact current services and potential new services</li> <li>■ Analyze the Strengths, Weaknesses, Opportunities and Threats (SWOT) in the overall health center and health care industries in comparison with those of the health center; present conclusions and facilitate discussion with senior leaders and Board of Directors to inform strategic and operational planning processes related to business development</li> </ul>
	<p>4</p>	<ul style="list-style-type: none"> <li>■ Correlate metrics such as patients served, increase in annual revenues, encounter cycle time and other operational metrics to determine service delivery improvements</li> <li>■ Analyze trends on year-over-year health center performance to drive decision regarding health center services</li> <li>■ Present market analyses, their potential impact on the health center, and recommendations to the Board of Directors for consideration and support</li> </ul>
	<p>3</p>	<ul style="list-style-type: none"> <li>■ Source information from annual surveys presented by the health care association on national trends, i.e., National Association of Community Health Centers (NACHC), American College of Healthcare Executives (ACHE), state Primary Care Association (PCA), etc.</li> <li>■ Conduct internal analysis of the health center's Strengths, Weaknesses, Opportunities and Threats (SWOT) to identify program and service opportunities as part of the strategic planning process</li> <li>■ Aware of health status indicators or unmet health care needs in the community served by the health center</li> </ul>

SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
<p>3. Acquire and maintain external and internal business intelligence through market-based /competitor analysis of local, regional, and national healthcare trends (including services and payment), competitive threats, expansion opportunities and internal performance trends and strengths &amp; challenges; and deliver data-driven analyses to support actionable strategic direction of the health center.</p>	<p>2</p>	<ul style="list-style-type: none"> <li>■ Understand how the Health Professional Shortage Areas (HPSAs) and its impacts on Medically Underserved Populations (MUPs) relate to service line expansion and develop actions for health centers through service development and partnership</li> <li>■ Aware of local competitors and community health care needs</li> <li>■ Understand the current market capture area (zip code analysis) and most recent needs assessment results</li> </ul>
	<p>1</p>	<ul style="list-style-type: none"> <li>■ Learning about national and regional Key Performance Indicators (KPI) in health centers and current market share</li> <li>■ Learning about market analysis and how it relates to business planning and development</li> </ul>
<p>4. Implement strategies to help ensure operating goals are met, including marketing, advertising and management of productivity, utilization, revenue, satisfaction, etc.; ensure the new or revamped programs or services are integrated into the ongoing operations of the health center and are sustainable.</p>	<p>5</p>	<ul style="list-style-type: none"> <li>■ Engage community and external relationships to promote new products and services</li> <li>■ Share results of new program implementation with broader health care community; compare &amp; contrast results with similar programs or services in other locations</li> <li>■ Oversee marketing communications and execute innovative outreach strategies for new services</li> <li>■ Utilize knowledge of positive health outcomes to help shape regulatory and reimbursement policy for successful new programs or services</li> </ul>

SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
<p>4. Implement strategies to help ensure operating goals are met, including marketing, advertising and management of productivity, utilization, revenue, satisfaction, etc.; ensure the new or revamped programs or services are integrated into the ongoing operations of the health center and are sustainable.</p>	<p>4</p>	<ul style="list-style-type: none"> <li>■ Understand the perceived value delivered, service delivery performance and volumes, and overall organizational performance as measured against strategic goals</li> <li>■ Monitor key operating variables and outcomes of the program or service, identify actions needed to enhance results and sustainability, and share with the health center leadership team, Board of Directors, and staff as appropriate</li> <li>■ Encourage and support the utilization and promotion of the new or revamped services health center-wide; ensure all staff are aware and know how to direct patients to the services offered</li> <li>■ Lead the selection and oversight of all external vendors (e.g., advertising, equipment, supplies, staffing, etc.) to help ensure goals are met and on time</li> </ul>

SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
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4. Implement strategies to help ensure operating goals are met, including marketing, advertising and management of productivity, utilization, revenue, satisfaction, etc.; ensure the new or revamped programs or services are integrated into the ongoing operations of the health center and are sustainable.

3

- Integrate the monitoring and tracking of key variables indicative of program health into the ongoing operations management of the health center; develop reporting, communications and management processes to monitor progress and course-correct quickly as needed (includes utilization, financial, quality, satisfaction, etc.)
- Work with senior leaders to identify and assign/ reassign internal resources and /or identify the need for additional staff or external contractors to support the implementation and success of the new program or service; manage budgets to support additional expenses incurred
- Share program evaluation information with the senior leadership team
- Engage selected health center clinical and operations leaders in the selection of effective marketing and sales strategies
- Ensure that messaging for new or revamped programs and services are integrated with existing health center communications strategies for the community and the staff (e.g., patient portal, website, employee email news, etc.)
- Ensure that marketing strategies incorporate all appropriate channels of communication for the target population, including health center platforms, social media, telephone, email, texting, events, etc.

2

- Support the development of new reports and integration of key program variables into existing operations management systems
- Monitor reports for results vis a vis budgeted or expected results and alert the management team of significant variances
- Research and illustrate the health center’s market in geographic and demographic terms to inform market definition, messaging and communication strategies




SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
<p>4. Implement strategies to help ensure operating goals are met, including marketing, advertising and management of productivity, utilization, revenue, satisfaction, etc.; ensure the new or revamped programs or services are integrated into the ongoing operations of the health center and are sustainable.</p>	<p>1</p>	<ul style="list-style-type: none"> <li>■ Learning about marketing procedures and health center communication best practices</li> <li>■ Learning about key variables to monitor and manage for new business success</li> </ul>
<p>5. Assure adherence to the health center ethical code and all applicable federal, state, and local laws, regulations, and generally accepted standards of conduct in the development of new business opportunities for the health center.</p>	<p>5</p>	<ul style="list-style-type: none"> <li>■ Invited to participate on state and federal level tasks forces and/or to offer comments on the development and updating of regulations and generally accepted standards of conduct in the development of health center business opportunities</li> <li>■ Oversee and collaboratively work with health center board and leaders to complete necessary components of Health Resources and Services Administration (HRSA) requirements and other governing bodies</li> </ul>
	<p>4</p>	<ul style="list-style-type: none"> <li>■ Implement policies and procedures to meet and maintain compliance at the health center when introducing new services and products</li> <li>■ Proactively communicate with external auditor and state/federal agencies to make informed decisions on standards of implementations of new products</li> </ul>
	<p>3</p>	<ul style="list-style-type: none"> <li>■ Able to work collaboratively to complete Health Resources and Services Administration (HRSA) add a service to scope checklist</li> <li>■ Oversee and collaboratively work with health center board and leaders to complete necessary components of Health Resources and Services Administration (HRSA) requirements and other governing bodies</li> </ul>



SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
<p>5. Assure adherence to the health center ethical code and all applicable federal, state, and local laws, regulations, and generally accepted standards of conduct in the development of new business opportunities for the health center.</p>	<p>2</p>	<ul style="list-style-type: none"> <li>■ Understand that certain service expansions are a part of their scope of project and includes updating the health center's Form 5A: Services Provided; Form 5B Service Site Information; 5C Other Service Activities</li> <li>■ Understand Health Resources and Services Administration (HRSA) definition of other lines of business and how that relates to Health Center Program benefits</li> </ul>
	<p>1</p>	<ul style="list-style-type: none"> <li>■ Learning about current regulatory guidelines from Health Resources and Services Administration (HRSA) and other governing bodies</li> </ul>

## VII. HUMAN RESOURCES MANAGEMENT

*Facilitating the development of knowledge, attitudes, skills, and behaviors necessary for team members to function together with a high degree of engagement and satisfaction within the department and the health center and at the highest possible levels of effective performance, team growth, development & engagement.*

SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
1. Oversee the determination of staffing requirements and patterns to support the strategic plans and programmatic goals of the health center.		<ul style="list-style-type: none"> <li>■ Disseminate best practices in creating cost-efficient, effective, and strategic health center staffing models</li> <li>■ Collaborate with local, state and national healthcare and higher education community to identify common staffing issues and goals and participate in the development of strategies to meet near term and future needs</li> <li>■ Engage health center executive leaders, Board of Directors and local community leaders in the implementation of plans to increase the availability of qualified health care personnel</li> </ul>
		<ul style="list-style-type: none"> <li>■ Proactively collaborate with health center leaders to identify staffing requirements to meet strategic programmatic goals</li> <li>■ Engage health center leaders, Board of Directors and local community in planning and activities to support optimal staffing for the health center</li> </ul>
		<ul style="list-style-type: none"> <li>■ Collaborate with the executive leadership team to ensure that effective strategies are used to support the development of efficient staffing models for health center programs</li> <li>■ Forecast staffing requirements and patterns to support strategic growth or shifts in health care personnel availability</li> <li>■ Ensure staffing requirements and patterns meet health center regulatory/accreditation/compliance requirements</li> <li>■ Evaluate staffing actual vs. planned staffing goals; implement modification plans as needed</li> </ul>

SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
1. Oversee the determination of staffing requirements and patterns to support the strategic plans and programmatic goals of the health center.	2	<ul style="list-style-type: none"> <li>■ Articulate the relationship between the health center’s staffing patterns and strategic plans</li> <li>■ Describe the health center’s current staffing model</li> <li>■ Understand the various positions, roles and responsibilities that make up the staffing model</li> </ul>
	1	<ul style="list-style-type: none"> <li>■ Define a staffing pattern and staffing model</li> <li>■ Learning about the health center’s staffing model and strategy</li> <li>■ Aware of the various roles and responsibilities of staff in the health center</li> </ul>
2. Ensure the alignment of health center policies and procedures with labor and human resource (HR) laws and regulations.	5	<ul style="list-style-type: none"> <li>■ Recognized as an expert in Human Resources (HR) laws and regulations</li> <li>■ Provide statewide and national guidance on HR law and regulations as it relates to health center operations</li> <li>■ Advocating for policies that support health center operations</li> </ul>
	4	<ul style="list-style-type: none"> <li>■ Work with the Board of Directors and executive leadership team to align strategic health center goals with labor and HR laws and regulations</li> <li>■ Implement systems to support and track the health center operations to ensure alignment with the labor and HR laws and regulations</li> </ul>

SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
2. Ensure the alignment of health center policies and procedures with labor and human resource (HR) laws and regulations.	3	<ul style="list-style-type: none"> <li>■ Evaluate and monitor health center operations for alignment and compliance with policy and procedures, labor laws and other human resources regulations</li> <li>■ Consult with and/or engage third-party experts for guidance and support as needed</li> </ul>
	2	<ul style="list-style-type: none"> <li>■ Apply existing policy and procedures to day-to-day health center operations</li> <li>■ Review policies and procedures for compliance with human resources-related labor laws and regulations</li> <li>■ Develop an audit schedule to track policy and procedure updates</li> </ul>
	1	<ul style="list-style-type: none"> <li>■ Demonstrate basic knowledge of health center human resources-related policies and procedures</li> <li>■ Learning about labor and human resource laws and regulations</li> </ul>

SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
<p>3. Hire, orient, retain, develop, manage, and ensure effective leadership of high-performing team members.</p>	<p>5</p>	<ul style="list-style-type: none"> <li>■ Maintain focus on strategic priorities, new business development, coaching leaders, and providing decision support to the Board of Directors and executive leadership team</li> <li>■ Maintain awareness of relevant resources available in the professional community through a variety of methods (e.g., networking, industry and professional organizations, conferences, research, etc.)</li> <li>■ Act as an internal consultant/mentor to support the growth of high performing health center managers/leaders</li> <li>■ Encourage staff involvement in leadership roles with industry and/or professional and civic organizations and other strategic partners</li> </ul>

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<p>4</p>	<ul style="list-style-type: none"> <li>■ Encourage team members to attend and participate in external conferences and represent the health center within the community</li> <li>■ Actively engage team members in preparation of presentations for diverse audiences, and provide support for new or unfamiliar tasks</li> <li>■ Develop a team of highly effective managers, capable of overseeing/doing most process-related &amp; tactical work independently</li> <li>■ Employee engagement assessments indicate high levels of employee satisfaction with almost all aspects of the job</li> <li>■ Champion a health center environment that embraces shared accountability and supports a just culture in managing employee performance issues</li> <li>■ Contribute to health center wide policies on employee performance management</li> </ul>
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SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
<p>3. Hire, orient, retain, develop, manage, and ensure effective leadership of high-performing team members.</p>	<p>3</p>	<ul style="list-style-type: none"> <li>■ Provide day to day oversight of a well-performing health center operations team</li> <li>■ Utilize just culture principles to manage performance issues</li> <li>■ Provide input and follow health center policies on managing employee performance issues</li> <li>■ Engage in personal continuing education to increase knowledge, skills and capacity for improved performance and taking on higher levels of responsibility</li> <li>■ Create opportunities for staff development</li> <li>■ Recruit, develop, and retain a diverse, high-quality workforce in an equitable manner</li> <li>■ Employee engagement assessments indicate high levels of employee satisfaction with most aspects of the job</li> </ul>
	<p>2</p>	<ul style="list-style-type: none"> <li>■ Support hiring, retention and staff development by participating in assigned projects, tasks and management processes</li> <li>■ Discuss the fundamental components of a strong staff retention and development program</li> <li>■ Participate in self or health center directed training in managing employee performance issues</li> <li>■ Understand the health center’s performance management policies and procedures</li> </ul>
	<p>1</p>	<ul style="list-style-type: none"> <li>■ Learning about staff engagement, and the tools available to support hiring, performance and retention</li> <li>■ Support elements of hiring, staff development and retention processes (e.g., reports, review of applications, etc.) as directed</li> <li>■ Learning about processes related to employee performance management</li> </ul>

SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
<p>4. Optimize operations team and individual performance in service to the health center and its mission (for example, manage expectations; provide timely feedback and recognition; ensure individuals have the knowledge, skills, mindset, and support needed, etc.).</p>	<p>5</p>	<ul style="list-style-type: none"> <li>■ Operate as an expert in team and individual performance in the workplace, lead talks locally, statewide and nationally</li> <li>■ Receive regular invitations to operational departmental meetings, provide support and innovation toward improving other departmental operations</li> <li>■ Develop and promote team as teachers and trusted advisors to others, sought after for advice, counsel and support</li> <li>■ Mentor and have mentored and developed Chief Operational Officers (COOs) now working elsewhere</li> </ul>
	<p>4</p>	<ul style="list-style-type: none"> <li>■ Ensure that team is involved with external industry and professional organizations, encouraging leadership and staff development</li> <li>■ Meet regularly with and coach team toward improved performance and career development</li> <li>■ Develop competency tools and surveys to measure team and individual performance</li> <li>■ Ensure entire health center is well-trained and effectively using all tools, system, and technologies necessary to affect an efficient organization</li> </ul>
	<p>3</p>	<ul style="list-style-type: none"> <li>■ Develop opportunities for staff recognition and appreciation to support team buy-in and overall performance</li> <li>■ Maintain favorable staff culture to positively impact workplace satisfaction and retention</li> <li>■ Ensure strategies and activities are in place to ensure the operations team and health center are well-trained and effectively using all tools, systems, and technologies necessary to affect an efficient organization</li> <li>■ Establish good partnerships with departments throughout the health center to foster teamwork</li> </ul>

SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
<p>4. Optimize operations team and individual performance in service to the health center and its mission (for example, manage expectations; provide timely feedback and recognition; ensure individuals have the knowledge, skills, mindset, and support needed, etc.).</p>	<p>2</p>	<ul style="list-style-type: none"> <li>■ Articulate the mission of the health center and the role of the operations team in assuring services are available to those in need</li> <li>■ Engage frequently in training and seek out supervision for unfamiliar tasks when needed</li> <li>■ Participate in activities aimed at increasing operations team performance and satisfaction</li> <li>■ Participate in self-assessment to identify immediate and long-term learning needs</li> </ul>
	<p>1</p>	<ul style="list-style-type: none"> <li>■ Learning about human resources management, rules and regulations associated with health centers and healthcare in general</li> <li>■ Maintain a daily focus on managing staff; seek advice and information often</li> </ul>
<p>5. Mentor key members of the leadership team to build strong leaders for the future (includes succession planning).</p>	<p>5</p>	<ul style="list-style-type: none"> <li>■ Facilitate talks on highly effective leadership locally, statewide and nationally</li> <li>■ Develop senior leaders to function with relatively high degree of autonomy</li> <li>■ Capable and/or ready for broader role in health center</li> <li>■ Known as an influencer in the health center, with ability to enlist the leadership team in support of operations goals health center-wide, including other department meetings, Board meetings, and with external organizations and groups</li> <li>■ Sought after by other Chief Operations Officers (COOs) within the industry for advice and counsel and mentorship</li> </ul>
	<p>4</p>	<ul style="list-style-type: none"> <li>■ Skilled at delivering feedback to staff, challenge key staff members to accept more challenging assignments</li> <li>■ Advocates for key staff members to engage in organization wide task forces, broadening their scope and depth of knowledge and relationships in other parts of the health center</li> </ul>



SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
5. Mentor key members of the leadership team to build strong leaders for the future (includes succession planning).	3	<ul style="list-style-type: none"> <li>■ Skilled at hiring and developing a competent team of professionals requiring minimal supervision and instruction</li> <li>■ Promote the ongoing development of talented team members by providing opportunities to participate in or lead special projects</li> <li>■ Operate as “teacher” as much as a “supervisor”</li> <li>■ Able to delegate responsibilities effectively with clear accountabilities and good follow up and support, while avoiding micromanagement</li> </ul>
	2	<ul style="list-style-type: none"> <li>■ Prefer hands on management, frequently engaged in close supervision and training of newer staff members</li> </ul>
	1	<ul style="list-style-type: none"> <li>■ Learning the basic principles of management and supervision of others</li> </ul>
6. Model and create a work environment where staff members demonstrate unconditional respect, collaboration, and kindness within the health center (includes all staff, Board of Directors, patients, families, and community residents).	5	<ul style="list-style-type: none"> <li>■ Operate as an expert in positive workplace culture, sharing information/presentations on the art of developing a collaborative team environment</li> <li>■ Consult with other health centers on how to improve workplace culture of unconditional respect, collaboration, and kindness</li> </ul>

SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
<p>6. Model and create a work environment where staff members demonstrate unconditional respect, collaboration, and kindness within the health center (includes all staff, Board of Directors, patients, families, and community residents).</p>	<p>4</p>	<ul style="list-style-type: none"> <li>■ Comfortable with key staff members engaging with departments throughout the health center to help create solutions, solve problems, offer advice and counsel</li> <li>■ Develop the leadership teams on workplace culture</li> <li>■ Mentor talented team member on the art of building positive and productive workplace culture</li> </ul>
	<p>3</p>	<ul style="list-style-type: none"> <li>■ Establish a collaborative, collegial and goal-oriented work environment</li> <li>■ Respected by health center peers for leading an effective team and serving as a trusted and integral resource</li> <li>■ Experience limited difficulty hiring from the outside due to a highly regarded reputation for professionalism and growth opportunities</li> <li>■ Experience low unintended turnover, high comradery, recognized for community and extracurricular involvement by the team</li> </ul>
	<p>2</p>	<ul style="list-style-type: none"> <li>■ Manage minor to moderate employee relations issues with assistance and/or oversight</li> <li>■ Employ strategies that positively impact workplace culture and employee retention</li> <li>■ Support or lead specific aspects of team building activities to encourage team members to develop stronger relationships</li> </ul>
	<p>1</p>	<ul style="list-style-type: none"> <li>■ Learning about effective strategies to positively impact workplace culture and employee retention</li> <li>■ Identify ways to evaluate workplace culture and employee satisfaction</li> </ul>

SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
7. Model and coach team members to develop self-awareness, knowledge, sensitivity, respect, and active support of diversity in the workforce	5	<ul style="list-style-type: none"> <li>■ Enjoy a reputation and recognition in the health center and the community as a leader fostering diversity, inclusion, and attracting talent from all segments of the community</li> <li>■ Create an environment where members in the department support and connect with diverse populations inside and external to the health center, positively impacting the health center's 'brand' and outreach into the communities served</li> </ul>
	4	<ul style="list-style-type: none"> <li>■ Establish departmental culture that respects individual differences, beliefs, and maintains a high level of both individual and departmental performance</li> <li>■ Create an environment where employees have a high level of comfort engaging proactively in solving interpersonal issues as they arise</li> <li>■ Encourage staff to become self-aware of internal and structural biases and proactively take steps to reduce their influence in decision-making and outcomes</li> </ul>
	3	<ul style="list-style-type: none"> <li>■ Develop cooperative and collaborative work environment that includes a diverse population of staff members</li> <li>■ Lead a department that is culturally sensitive and welcoming of personal differences and opinions</li> <li>■ Proactively work with Human Resources and outside resources to train and maintain awareness for sensitivities and cultural competence</li> <li>■ Take steps to become more self-aware of internal and structural biases and how to proactively take steps to reduce their influence in decision-making and outcomes</li> </ul>

SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
7. Model and coach team members to develop self-awareness, knowledge, sensitivity, respect, and active support of diversity in the workforce	2	<ul style="list-style-type: none"> <li>■ Becoming aware of internal and structural biases and how they influence decision-making and health outcomes</li> <li>■ Pursue education to recognize biases in myself and others and how to be an agent of change</li> </ul>
	1	<ul style="list-style-type: none"> <li>■ Becoming aware of interpersonal issues arising from cultural differences among the team members</li> <li>■ Learning to recognize the presence and impact of various staff alliances and informal leadership and authority</li> </ul>
8. Facilitate self and team knowledge and utilization of Emotional Intelligence and other effective strategies and concepts to improve interpersonal communications and effectiveness.	5	<ul style="list-style-type: none"> <li>■ Recognized as a trusted leader and counsel for effective interpersonal interactions within and among the Board of Directors, leadership team, and among policy setters within the industry</li> <li>■ Operate as a known expert in the utilization of emotional intelligence and or other interpersonal interaction frameworks and strategies; facilitate talks locally, statewide and nationally</li> <li>■ Serve as an executive coach</li> </ul>
	4	<ul style="list-style-type: none"> <li>■ Develop other leaders within the health center to operate at high levels of emotional intelligence and navigate through conflict</li> <li>■ Facilitate trainings related to concepts and strategies to improve interpersonal communication and effectiveness</li> </ul>

SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
<p>8. Facilitate self and team knowledge and utilization of Emotional Intelligence and other effective strategies and concepts to improve interpersonal communications and effectiveness.</p>	<p>3</p>	<ul style="list-style-type: none"> <li>■ Consistently recognize, interpret, communicate, and differentiate between emotions</li> <li>■ Communicate personal perspectives on health center related matters and conflicts in a manner that respects individuals and is focused on developing understanding and determining solutions</li> <li>■ Effectively communicate and navigate changes within the department and health center with emotional intelligence, minimizing disruption to staff engagement and productivity</li> <li>■ Able to minimize chaos and drama within the operations department and during interdepartmental communications and interactions</li> <li>■ Stay calm under pressure, resolve conflict effectively, and respond to co-workers with empathy</li> </ul>
	<p>2</p>	<ul style="list-style-type: none"> <li>■ Frequently recognize, interpret, communicate, and differentiate between my own and others' emotions</li> <li>■ Communicate personal perspectives on health center related matters and conflicts in professional, non-confrontational manner</li> <li>■ May prefer utilization of expedient/impersonal forms of communication (e.g., email, text messaging) over more time-consuming or uncomfortable interpersonal communication modes</li> </ul>
	<p>1</p>	<ul style="list-style-type: none"> <li>■ Beginning to recognize, interpret, communicate, and differentiate between emotions</li> <li>■ Understand the influence of emotions upon interactions and decision-making</li> </ul>

SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
<p>9. Effectively manage change and engage the team by leading with a transformational mindset, disciplined agile mindset, and/or other effective change management constructs and best practices.</p>	<p>5</p>	<ul style="list-style-type: none"> <li>■ Conduct presentations on transformational or other change management mindsets and their role in health center growth and development locally, statewide and nationally</li> <li>■ Operate as a consultant for health center leadership teams in the development of leaders to serve as effective agents of change</li> </ul>
	<p>4</p>	<ul style="list-style-type: none"> <li>■ Proactively seek solutions to lower costs, improve efficiencies in all areas of the business and prepare and engage the impacted health center staff for the upcoming changes and implementation strategy and processes</li> <li>■ Skillfully engage team members to determine functions to outsource vs. insource based upon cost effectiveness and performance</li> <li>■ Build and develop new health center programs and activities from the lessons learned through prior experiences</li> <li>■ Operate comfortably in an environment of ambiguity, constant change and evolution</li> <li>■ Demonstrate the ability to strategically develop and implement health center-wide improvements and efficiencies and facilitate staff acceptance</li> </ul>
	<p>3</p>	<ul style="list-style-type: none"> <li>■ Possess a growth-oriented mindset, accepting change approaching each day as a learning opportunity</li> <li>■ Able to lead a team in the development of effective methods and strategies to implement change on a department or health center-wide basis</li> <li>■ Demonstrate flexibility and ability to pivot and quickly recover when change is necessary to increase the effectiveness of implementing a new process or programs</li> <li>■ Efficient at implementing and communicating change while successfully gaining buy-in from team</li> </ul>

SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
<p>9. Effectively manage change and engage the team by leading with a transformational mindset, disciplined agile mindset, and/or other effective change management constructs and best practices.</p>	2	<ul style="list-style-type: none"> <li>■ Able to connect issues and potential resolutions</li> <li>■ Implement changes and shifts ideologies around strategic direction with support or when prompted</li> <li>■ Comfortable working with a team to identify methods and strategies to implement change on a department or health center-wide basis</li> </ul>
	1	<ul style="list-style-type: none"> <li>■ Recognize an issue and the need for change</li> <li>■ Challenged with identifying methods and strategies to implement change on a department or health center-wide basis</li> </ul>
<p>10. Model and facilitate the leadership team's understanding and implementation of appropriate self-care/ work-life harmony (for example, demonstrate knowledge of the causes and effects of the lack of self-care, identify instances of lack of successful self-care, offer effective self-care improvement and maintenance strategies, etc.).</p>	5	<ul style="list-style-type: none"> <li>■ Facilitate employee wellness seminars locally, statewide and nationally sharing techniques and strategies around work-life harmony</li> <li>■ Have notable success positively impacting health center morale and culture through employee health and wellness initiatives</li> <li>■ Actively participate in or lead community activities related to work-life harmony, health and wellness</li> </ul>
	4	<ul style="list-style-type: none"> <li>■ Effectively build health center culture through promoting and encouraging wellness; strategically incorporating access to physical, social, and emotional health and fitness</li> <li>■ Oversee the development, implementation and ongoing management of the health center employee wellness program, including an Employee Assistance Program (EAP), and health, social and financial wellness</li> <li>■ Create opportunities to educate team members on work-life Harmony strategies and techniques</li> <li>■ Lead or facilitate health center-wide initiatives promoting work-life harmony, health and wellness</li> </ul>

SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
<p>10. Model and facilitate the leadership team's understanding and implementation of appropriate self-care/ work-life harmony (for example, demonstrate knowledge of the causes and effects of the lack of self-care, identify instances of lack of successful self-care, offer effective self-care improvement and maintenance strategies, etc.).</p>	<p>3</p>	<ul style="list-style-type: none"> <li>■ Effectively model good work-life harmony and encourage healthy communication and mutual support among team members</li> <li>■ Intentionally incorporate scheduled leave away from the office to engage in non-work-related activity</li> <li>■ Support and encourage team members' use of scheduled leave away from work for personal time, vacations, and professional development</li> <li>■ Respect team members' time off; refrain from disrupting their time away from the office</li> <li>■ Actively participate in health center activities related to work-life harmony, health and wellness and encourage team members to do the same</li> <li>■ Ensure all staff members understand how to utilize effective time management principles</li> <li>■ Make recommendations to senior leaders for needed services/resources to support employee health and wellness and work-life harmony</li> </ul>
	<p>2</p>	<ul style="list-style-type: none"> <li>■ Able to discuss how daily, cyclical, and unexpected work tasks impact work-life harmony</li> <li>■ Establish priorities and manage time to successfully complete the most impactful tasks/goals</li> <li>■ Participate in training and may secure support related to time management principles</li> <li>■ Take time off from work sparingly</li> <li>■ Occasionally participate in health center sponsored activities and take advantage of resources supporting work-life harmony, health &amp; wellness</li> </ul>
	<p>1</p>	<ul style="list-style-type: none"> <li>■ May have difficulty managing the demands of work and home life</li> <li>■ Able to identify imbalances between work and home life (personal or others)</li> <li>■ Recognize work-related stressors and how they impact employee performance and long-term satisfaction</li> <li>■ Learning about strategies to improve work-life harmony and long-term job satisfaction</li> <li>■ Aware of health center sponsored activities and take advantage of resources supporting work – life harmony, health and wellness</li> </ul>



## VIII. STRATEGIC PLANNING, MARKETING, AND COMMUNICATIONS

*Strategically assessing and evaluating courses of action, identifying imaginative opportunities to improve performance and position, and implementing innovative and cost-effective solutions leading to effective change management and business process improvement. Working closely with C-suite and service line leaders, facilitate the development, execution, and monitoring of the health center annual and strategic operating plans; and data-informed, efficient, and effective communication of programs, services, goals and progress among the leadership team and throughout the health center.*

SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
1. Demonstrate business acumen and creativity in strategic operations and project planning, utilizing data to determine strategic growth/innovation opportunities (both internally and externally).	5	<ul style="list-style-type: none"><li>■ Lead community/state or national planning committees in the identification of and planning for areas for future growth and improvement in the health center industry</li><li>■ Spearhead innovative projects and team activities that create movement on a governmental level broadly impacts multiple areas of health center operations</li><li>■ Identify budget and cash flow solutions that are accessible, on-demand, and to a broad audience</li><li>■ Share knowledge about creating financially sound and successful strategies to promote health center growth and innovation with local, state and national leaders</li></ul>
	4	<ul style="list-style-type: none"><li>■ Establish robust data analytics capabilities within the organization, leveraging both internal and external data sources</li><li>■ Able to develop and communicate a clear vision and strategy that aligns with the health center's goals and objectives, and can anticipate and respond effectively to changes in the external environment</li><li>■ Encourage a culture of innovation and creativity throughout the organization, fostering an environment where new ideas are welcomed and rewarded</li><li>■ Integrate a strategic framework into planning processes throughout the health care center</li></ul>

SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
<p>1. Demonstrate business acumen and creativity in strategic operations and project planning, utilizing data to determine strategic growth/innovation opportunities (both internally and externally).</p>	<p>3</p>	<ul style="list-style-type: none"> <li>■ Accurately identify the impact of future needs of the organization based on local, state and national events in the healthcare industry and express in measurable and actionable ideas</li> <li>■ Demonstrate an understanding of the impact of established goals on operations, clinical workflows and finances</li> <li>■ Communicate result variances in deliverables to stakeholders and develop plans for improvement</li> <li>■ Utilize existing or create new reports to establish a baseline and trajectory for planning</li> <li>■ Identify and manage teams to accomplish the agreed upon goals; communicate individuals' roles and responsibilities for the proper planning, implementation, and management of programs across the health center</li> <li>■ Collaborate with relevant stakeholders, including IT departments, facilities management, and emergency response teams, to ensure a comprehensive approach to risk mitigation in the strategic planning process</li> </ul>
	<p>2</p>	<ul style="list-style-type: none"> <li>■ Utilize data analysis tools and techniques to identify patterns, trends, and insights that inform strategic decision making</li> <li>■ Actively seek out and engage in learning opportunities</li> <li>■ Able to understand the health center's strategy and goals and contribute to the development of operational plans that support these objectives</li> </ul>
	<p>1</p>	<ul style="list-style-type: none"> <li>■ Understand expectations for planning and growth in the individual organization</li> <li>■ Explore training opportunities for strategic planning</li> <li>■ Collaborate with internal partners to understand current opportunities</li> </ul>

SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
<p>2. Assist in identifying potential opportunities for growth and development; integrate business development goals and objectives into the overall health center strategic plan.</p>	<p>5</p>	<ul style="list-style-type: none"> <li>■ Demonstrate a deep understanding of the health center’s strategic vision and proactively engage in driving results at local, state, and national levels</li> <li>■ Able to conceptualize and drive vertical and horizontal partnerships and collaborations that will drive community improvement beyond the healthcare space</li> <li>■ Collaborate with health center leaders to engage customer segments, expand access to health care, and articulate outcomes internally at the health center level and externally to appropriate entities that can assist in facilitating change in the State and Federal arenas</li> </ul>
	<p>4</p>	<ul style="list-style-type: none"> <li>■ Identify and evaluate potential growth opportunities, such as new markets, product/service expansions, or acquisitions</li> <li>■ Continually seek out opportunities to expand the health center’s strategic plan to meet the health care needs of the community</li> <li>■ Articulate opportunities and threats, keep abreast of trends and innovations that can change the healthcare landscape</li> </ul>
	<p>3</p>	<ul style="list-style-type: none"> <li>■ Engage internal leaders in strategic discussion of the health center’s strengths, weaknesses, opportunities, and threats; explore new ways to leverage opportunities for the organization</li> <li>■ Able to define target populations of patients and community partners to further the strategic goals of the health center</li> </ul>
	<p>2</p>	<ul style="list-style-type: none"> <li>■ Aware of local competitors and community health needs</li> </ul>
	<p>1</p>	<ul style="list-style-type: none"> <li>■ Learning about the health center’s strategic plan and processes</li> <li>■ Explore and Identify training opportunities in strategic planning and strategic thinking</li> </ul>

SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
<p>3. Lead the development, communication and monitoring of the health center strategic and operating plans and appropriately engage interdepartmental and interdisciplinary participation when indicated.</p>	<p>5</p>	<ul style="list-style-type: none"> <li>■ Lead initiatives in strategic planning internally and in collaboratives on many stages</li> <li>■ Lead internal stakeholders in the development of strategic planning through enhancing their knowledge by sharing the impact of correctly executed plans and the steps on proper implementation of plans</li> <li>■ Actively advocate for improved education of management to be stronger partners in execution of planning and development</li> </ul>
	<p>4</p>	<ul style="list-style-type: none"> <li>■ Proactively engage in the development of the strategic plan</li> <li>■ Work with leadership to create new and innovative ways to educate the health center staff on the strategic plan and related activities</li> <li>■ Coach others on communicating the strategic plan and related activities throughout the center</li> <li>■ Identify and define the strategic and operations objective locally if required to speak to press, develop press releases and represent the health center at events</li> <li>■ Establish a culture of continuous improvement and vigilance regarding disaster planning, fostering a proactive and prepared mindset across the health center</li> </ul>

SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
<p>3. Lead the development, communication and monitoring of the health center strategic and operating plans and appropriately engage interdepartmental and interdisciplinary participation when indicated.</p>	<p>3</p>	<ul style="list-style-type: none"> <li>■ Actively communicate to all levels of organization members and stakeholders the vision and expectation and reason for each planning topic</li> <li>■ Develop and manage Key Performance Indicators (KPIs) and metrics to track the achievement of strategic objectives</li> <li>■ Identify correct staff to be in each level of projects and actively educate them to be advocates and Subject Matter Experts (SMEs) in the planning and execution phases</li> <li>■ Create engaging timelines to be assigned to team members for each stage of the project and accountability in expected updates and metrics that need to be monitored in each stage</li> <li>■ Develop a comprehensive Business Continuity Plan (BCP) that outlines strategies, procedures, and protocols to ensure the health center can continue essential operations during and after a disruption or disaster</li> </ul>
	<p>2</p>	<ul style="list-style-type: none"> <li>■ Familiar with the components and status of the strategic plan</li> <li>■ Understand the fundamentals of the need to communicate the plan to staff and stakeholders</li> <li>■ Ensure that the strategic plan reflects the needs and aspirations of all major stakeholders, consider input from clinical and non-clinical staff, providers, patients, and members of the community-at-large</li> </ul>
	<p>1</p>	<ul style="list-style-type: none"> <li>■ Become familiar with the components of the strategic plan</li> <li>■ Contribute to reports on measurable objectives, such as Key Performance Indicators (KPIs)</li> <li>■ Collaborate with internal partners to understand the status of current components and the importance of future components of the strategic plan and how to communicate them</li> <li>■ Provide regular updates to senior leadership, board members, and other key stakeholders on the implementation and impact of the strategic plan</li> </ul>

SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
4. Adopt and apply innovative methods and technologies to implement strategy and manage change.	5	<ul style="list-style-type: none"> <li>■ Foster partnerships and collaborations with external organizations, such as technology vendors, research institutions, and other healthcare providers, to leverage their expertise and stay at the forefront of healthcare innovation</li> <li>■ Participate in regional or national networks and forums focused on disaster planning and response to share best practices, lessons learned, and stay updated on emerging trends</li> <li>■ Advocate for innovative and readily available best practice training programs at the local and national level; focus on technological efficiencies, data-informed decision making, and real-time case studies that exemplify how health centers rely on technology to drive favorable results</li> <li>■ Bring innovation to the Executive team for review and develop potential metrics to present for measuring outcomes of adoption of new processes</li> </ul>

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4	<ul style="list-style-type: none"> <li>■ Work with the IT and HIT teams to develop automated reporting, dashboards, etc., to reduce manual data manipulation</li> <li>■ Establish forums or innovation committees where employees and other stakeholders can share ideas, collaborate, and contribute to the identification and adoption of innovative solutions</li> <li>■ Create a culture of fast and easy access to health center data and financial reports, advocate for paperless systems, cloud-managed data, and access on-demand for critical stakeholders</li> <li>■ Collaborate with cross-functional teams and stakeholders to identify strategic needs and areas where innovative methods and technologies can be applied to improve operations, patient care, and outcomes</li> <li>■ Develop creative strategies and plans to mitigate and minimize the impact of identified risks, including natural disasters, technological failures, cybersecurity breaches, or public health emergencies</li> </ul>
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SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
<p>4. Adopt and apply innovative methods and technologies to implement strategy and manage change.</p>	<p>3</p>	<ul style="list-style-type: none"> <li>■ Create teams to implement systems that streamline access to data</li> <li>■ Continually seek out operational efficiencies, networking with peers to learn about their best practices, and implement innovative solutions when applicable and approved by their team</li> <li>■ Collaborate with IT teams, clinical staff, and other relevant stakeholders to assess the usability, interoperability, and scalability of potential technologies</li> <li>■ Encourage and empower staff to embrace innovation and participate in identifying and implementing new methods and technologies</li> <li>■ Recognize and reward employees for their contributions to innovation and successful implementation of new technologies</li> <li>■ Strive to maintain both a big-picture and detailed systems orientation</li> <li>■ Assess the potential impact of disruptions or disasters on critical functions, such as patient care, IT systems, supply chain, and revenue streams</li> <li>■ Establish mechanisms to regularly review, update, and improve the Business Continuity Plan (BCP) based on lessons learned from real incidents, exercises, and external feedback</li> </ul>

SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
4. Adopt and apply innovative methods and technologies to implement strategy and manage change.	2	<ul style="list-style-type: none"> <li>■ Provide leadership and support to employees during the transition period, addressing concerns, providing training and resources, and fostering a culture of innovation and continuous learning</li> <li>■ Understand that increased investment in software solutions can reduce employee workload and allow for employees to work at the top of their skillset</li> <li>■ Learn where inefficiencies exist, collaborate with internal leaders to understand the areas of dissatisfaction and barriers to accessing health center data and financial reports</li> <li>■ Collaborate with cross-functional teams and stakeholders to identify strategic needs and areas where innovative methods and technologies can be applied to improve operations, patient care, and outcomes</li> </ul>

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1	<ul style="list-style-type: none"> <li>■ Explore health center trends and learn where opportunities for productive change exist</li> <li>■ Seek out additional training in HIT to understand how a health center must operate to meet all reporting requirements</li> </ul>
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SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
5. Utilize sound decision-making in the execution of strategic and operational objectives	5	<ul style="list-style-type: none"> <li>■ Proven ability to innovate strategic and operational objectives by participating in national, state and community events that advocate for funding to support these initiatives in all health centers</li> <li>■ Shows the ability to determine what strategies are most effective in their current position</li> </ul>
	4	<ul style="list-style-type: none"> <li>■ Establish a project management framework to ensure effective planning, execution, and monitoring of strategic initiatives</li> <li>■ Develop a comprehensive change management plan that includes communication strategies, stakeholder engagement, and training programs to support the achievement of strategic and operational objectives</li> <li>■ Foster collaboration and engagement among senior leaders, department heads, and staff members across the health center</li> <li>■ Understands the underlying effects of decisions and what is needed to receive team alignment with them</li> <li>■ Develop contingency plans and mitigation strategies to address risks and minimize their impact on the health center's objectives</li> </ul>

SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
5. Utilize sound decision-making in the execution of strategic and operational objectives	3	<ul style="list-style-type: none"> <li>■ Identify and define the strategic and operations objective on a daily basis with teams</li> <li>■ Encourage open communication and active participation in decision-making processes, seeking diverse perspectives and ideas</li> <li>■ Provide regular feedback, coaching, and support to employees, enabling them to achieve desired outcomes and drive continuous improvement</li> <li>■ Clearly defining any problems and weighing several solutions, selecting the best solution that benefits all involved</li> <li>■ Ability to articulate the problems and solutions as well as the thought process for finalizing the decision</li> <li>■ Gather and analyze relevant data from various sources to inform decision-making processes (may include financial data, patient outcomes, operational metrics, market research, and industry trends)</li> </ul>
	2	<ul style="list-style-type: none"> <li>■ Identify problems/barriers related to the strategic goals</li> <li>■ Apply critical thinking skills to interpret data, weigh options, and make informed decisions based on evidence</li> <li>■ Break down objectives into measurable goals and Key Performance Indicators (KPIs) to track progress and ensure accountability</li> </ul>
	1	<ul style="list-style-type: none"> <li>■ Identify and attend training to assist in strategic and tactical thinking</li> <li>■ Learning how to establish goals and objectives are specific, realistic, and time-bound, to enable effective execution and evaluation</li> </ul>

SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
<p>6. Develop and disseminate market-informed education and information to increase community awareness and utilization of health center services and the health center’s “Employer of Choice” (EOC) status; ensure health center staff are informed and educated about introducing new services and programs.</p>	<p>5</p>	<ul style="list-style-type: none"> <li>■ Innovate tactics for internal and external parties regarding community awareness of service offerings</li> <li>■ Have a clear track record of achieving “health center of Choice” and “Employer of Choice” status</li> <li>■ Educate and collaborate with local, state and national entities on developing and implementing marketing techniques to increase utilization of services</li> </ul>

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<p>4</p>	<ul style="list-style-type: none"> <li>■ Foster a culture of continuous learning and professional development, providing opportunities for staff to enhance their knowledge and skills related to new services and programs</li> <li>■ Work with the Outreach and Patient Engagement departments to ensure concise communication of Emergency Operations Center (EOC) and services as they are out in the community</li> <li>■ Foster relationships and partnerships with community organizations, schools, local businesses, and other stakeholders to enhance community awareness and utilization of health center services</li> </ul>
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SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
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6. Develop and disseminate market-informed education and information to increase community awareness and utilization of health center services and the health center’s “Employer of Choice” (EOC) status; ensure health center staff are informed and educated about introducing new services and programs.

3

- Work with appropriate parties within the organization to effectively disseminate information about new programs and services and ensure strategic messages are communicated appropriately and that the health center “brand” is reinforced
- Oversee the education and training of health center staff on new programs and services and how to best promote them with the community
- Consistently partner with HR to develop plans to prevent employee and provider burnout related to new and innovative services
- Conduct regular staff meetings, publish newsletters, and conduct training sessions to provide updates on the health center’s offerings and educate staff on how to effectively introduce and promote new services to patients
- Utilize data-driven decision-making and adjustments to optimize marketing strategies and improve desired outcomes

2

- Describe the various elements involved in “Employer of Choice” and “Health Center of Choice” status
- Understand the importance of market-informed education and community awareness of service offering
- Stay updated on industry best practices and emerging trends in healthcare marketing and employer branding
- Support data-driven decision-making and adjustments improve community engagement and staff education outcomes

1

- Aware of the importance of market-informed education and information regarding the health center’s services
- Seek training and additional information to learn more about market-informed education, “Employer of Choice” and “Health Center of Choice” status

## IX. INFORMATION MANAGEMENT

Using secure technology to ensure that health information is confidential, available when and where it is needed, and contributes to safer, higher quality, more coordinated, more efficient, and less costly care for everyone, and leveraging technology to optimize business processes across the health center enterprise.

Note: This domain is especially appropriate for COOs to whom IT reports or who are responsible for the IT function.

SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
1. In collaboration with the IT department, lead the evaluation of technology and software that will optimize the patient and employee experience.	5	<ul style="list-style-type: none"> <li>■ Recognized as a leader and mentor for health data management and educating others at a national level</li> <li>■ Called upon as a resource for other health centers</li> </ul>
	4	<ul style="list-style-type: none"> <li>■ Lead successful evaluation and implementation of enterprise systems [Electronic Health Record (EHR) Practice Management (PM), Human Resources (HR),] using personal experience</li> <li>■ Maintain awareness of innovation in Health Information Technology (HIT); Keep abreast of trends in technological developments in enterprise systems</li> </ul>
	3	<ul style="list-style-type: none"> <li>■ Ensure the appropriate evaluation tools and implementation strategies for enterprise systems</li> <li>■ Build competence within the Information Technology (IT) department to understand existing and alternative technologies</li> <li>■ Know when to consult external/third-party experts in identifying best practices and strategies for HIT management</li> </ul>
	2	<ul style="list-style-type: none"> <li>■ Understand fundamental concepts, including advantages and disadvantages of enterprise management systems for health center application</li> </ul>
	1	<ul style="list-style-type: none"> <li>■ Aware of the need for enterprise systems to boost the operational and clinical aspects of the health center</li> <li>■ Gaining familiarity with Health Information Technology (HIT) systems</li> </ul>

SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
2. Facilitate the integration of technology to optimize health center operations.	5	<ul style="list-style-type: none"> <li>■ Serve as a resource for implementation of integrative technologies and optimization of health center operations</li> </ul>
	4	<ul style="list-style-type: none"> <li>■ Anticipate how health care trends will impact the utilization of enterprise systems within health center operations</li> <li>■ Establish/assure systems and processes for enterprise management are as efficient/automated as feasible</li> </ul>
	3	<ul style="list-style-type: none"> <li>■ Define and prioritize information systems goals in collaboration with senior management, IT staff/contractors</li> <li>■ Manage IT staff/contractors to support the introduction, integration and/or upgrading of technology into health center operations</li> </ul>
	2	<ul style="list-style-type: none"> <li>■ Articulate an understanding of existing technology integration</li> </ul>
	1	<ul style="list-style-type: none"> <li>■ Learning about the integration of technology within a health center setting</li> </ul>

SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
3. Lead and participate in Security Risk Assessments.	5	<ul style="list-style-type: none"> <li>■ Participate in advanced training on the elements of Security Risk Assessments (SRA)</li> <li>■ Utilized as a resource for other CHC's related to Security Risk Assessments (SRA)</li> <li>■ Conduct Security Risk Assessments (SRA) and assist in drafting action plans as a health center consultant</li> </ul>
	4	<ul style="list-style-type: none"> <li>■ Create new/streamlined procedures for identifying security issues and how they may impact the health center</li> <li>■ Develop action plans related to issues identified in the Security Risk Assessments (SRA)</li> <li>■ Remain current on new guidelines, best practices, regulations</li> </ul>
	3	<ul style="list-style-type: none"> <li>■ Assist senior management/contractors with SRA completion</li> <li>■ Ensure all appropriate policies and procedures have been reviewed before Security Risk Assessment (SRA) engagement</li> <li>■ Identify, vet and select SRA vendors in collaboration with IT management</li> </ul>
	2	<ul style="list-style-type: none"> <li>■ Understand the fundamental requirements for a Security Risk Assessment (SRA)</li> </ul>
	1	<ul style="list-style-type: none"> <li>■ Aware of the Security Risks Assessment process</li> </ul>

SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
4. Assist in developing the departmental strategic plan for information management (using the organization's overall strategic plan as a starting point).	5	<ul style="list-style-type: none"> <li>Train others and serve as a resource for information systems planning</li> </ul>
	4	<ul style="list-style-type: none"> <li>Lead the staff in continually aligning/realigning objectives of the departmental plan with the organization's strategic plan</li> <li>Ensure that the departmental plan is actively referenced as routine decisions are made</li> <li>Coach staff on continued implementation and revision of the plan</li> </ul>
	3	<ul style="list-style-type: none"> <li>Work with IT department staff to set and communicate specific, measurable objectives that align with the departmental and organizational strategic plans</li> </ul>
	2	<ul style="list-style-type: none"> <li>Know the structure and components of a strategic plan for information management</li> </ul>
	1	<ul style="list-style-type: none"> <li>Understand the importance of setting measurable goals and objectives</li> </ul>



SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
5. Serve as a champion for the utilization of effective technologies.	5	<ul style="list-style-type: none"> <li>■ Conduct presentations or serve as a consultant on the utilization of effective technologies for operations management</li> </ul>
	4	<ul style="list-style-type: none"> <li>■ Evaluate and integrate advances in software and systems and accessibility to improve communications and management throughout the health center</li> <li>■ Demonstrate a high level of understanding as well as utilization of technologies as designed for remote team engagement, document sharing, editing, and general communications</li> </ul>
	3	<ul style="list-style-type: none"> <li>■ Model appropriate utilization of communications and business software and adherence to organization policies concerning IT</li> </ul>
	2	<ul style="list-style-type: none"> <li>■ Demonstrate a fundamental level of understanding and appropriate utilization of communications software and technologies</li> </ul>
	1	<ul style="list-style-type: none"> <li>■ Seek coaching on tech-based communication, presentation, analysis, and reporting skills; utilize newly learned skills immediately and seek out feedback on results</li> </ul>

SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
6. Ensure interoperability between/among technologies to optimize organizational effectiveness and efficiency.	5	<ul style="list-style-type: none"> <li>Utilized as a resource and known on the national level as a expert in interoperability</li> </ul>
	4	<ul style="list-style-type: none"> <li>Direct IT team to use integration engines and other tools to transform health data to ease system interoperability</li> <li>Establish automated processes for enterprise systems</li> </ul>
	3	<ul style="list-style-type: none"> <li>Define a priority list for interoperability goals for the health center</li> <li>Manage IT staff to implement reliable and accurate methods for data exchange between the existing systems</li> <li>Evaluate/vet data for accuracy and integrity to assure decisions are made based on good information</li> </ul>
	2	<ul style="list-style-type: none"> <li>Articulate a comprehensive understanding of existing communications between major systems</li> </ul>
	1	<ul style="list-style-type: none"> <li>Learning the interdependence of major IT systems</li> </ul>

SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
7. Ensure that IT infrastructure and staffing optimally support health center operations.	5	<ul style="list-style-type: none"> <li>■ Play a role in national meetings and collaborative initiatives with other organizations</li> </ul>
	4	<ul style="list-style-type: none"> <li>■ Ensure appropriate disaster recovery services</li> <li>■ Assure implementation of security measures</li> </ul>
	3	<ul style="list-style-type: none"> <li>■ Evaluate the strengths and weaknesses of the IT function and systems</li> <li>■ Create remediation plans for staffing and system deficits</li> <li>■ Manage routine issues internally with the IT team</li> </ul>
	2	<ul style="list-style-type: none"> <li>■ Aware of some strengths and weaknesses of the health center's IT functions and systems</li> <li>■ Understand what elements are needed for effective IT functions</li> </ul>
	1	<ul style="list-style-type: none"> <li>■ Acquiring basic information regarding IT network structure; learning current departmental practices</li> </ul>

SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
8. Develop strategy to ensure compliance with regulatory bodies and health center directives, policies and procedures.	5	<ul style="list-style-type: none"> <li>Act, where necessary, to fulfill Board directions concerning information management compliance matters</li> </ul>
	4	<ul style="list-style-type: none"> <li>Ensure directors and executives understand information management regulatory measures needed to fulfill their respective obligations in collaboration with the Compliance staff</li> </ul>
	3	<ul style="list-style-type: none"> <li>Ensure survey readiness and accountability through internal controls, policies and procedures (P&amp;P)</li> </ul>
	2	<ul style="list-style-type: none"> <li>Expand knowledge and understanding of risk-based approaches to monitor and test for information management compliance in collaboration with the IT staff</li> </ul>
	1	<ul style="list-style-type: none"> <li>Participate in training and education to expand knowledge and general skill in making diligent inquiries when faced with non-compliance</li> </ul>

SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
9. Collaborate with key stakeholders to develop and implement emergency response and business continuity plans.	5	<ul style="list-style-type: none"> <li>■ Provide training on a national level to health center staff on emergency preparedness and response and business continuity</li> <li>■ Keep abreast of the type and nature of ever-changing threats</li> </ul>
	4	<ul style="list-style-type: none"> <li>■ Known for expertise in emergency management and business continuity planning and implementation</li> <li>■ Serve as a resource to neighboring health centers to consult on emergency preparedness and business continuity planning</li> </ul>
	3	<ul style="list-style-type: none"> <li>■ Oversee the implementation and ongoing effectiveness of the health center's emergency response and BCP to ensure minimal operational interruption related to IS functions</li> <li>■ Ensure proactive plans are in place for the security of and access to critical health center information, including patient, staff, financial and operations to minimize downtime and risk</li> <li>■ Articulate the rationale for the proactive creation of a Business Continuity Plan (BCP)</li> <li>■ Understand when and to how get additional information and needed support for emergency response and Business Continuity Plans (BCPs)</li> </ul>
	2	<ul style="list-style-type: none"> <li>■ Assess the threats to the organization and begin constructing the framework for preparedness and continuity efforts</li> </ul>
	1	<ul style="list-style-type: none"> <li>■ Learning the framework and application of emergency preparedness and business continuity</li> <li>■ Learning the regulations concerning emergency response planning for health centers</li> </ul>

SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
10. Facilitate the execution of the telehealth program.	5	<ul style="list-style-type: none"> <li>■ Provide training and consulting on a national level to health center staff on telehealth implementation, strategy, and telehealth reimbursement</li> <li>■ Serve as a mentor to less experienced colleagues</li> </ul>
	4	<ul style="list-style-type: none"> <li>■ Able to implement a telehealth program</li> <li>■ Keep abreast of legislation, reimbursement and other circumstances governing the use of telehealth and anticipate changes to the landscape</li> </ul>
	3	<ul style="list-style-type: none"> <li>■ Articulate the fundamental requirements for successful telehealth programming/services</li> <li>■ Manage the development and execution of effective and efficient telehealth services</li> <li>■ Understand when and how to get additional information and needed support</li> </ul>
	2	<ul style="list-style-type: none"> <li>■ Learn from others who are more experienced in implementing telehealth</li> <li>■ Assess the needs of the organization</li> </ul>
	1	<ul style="list-style-type: none"> <li>■ Acquiring basic knowledge of telehealth</li> </ul>

SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
11. Promote the adoption of a health information and data management culture to acquire, create, organize, distribute, and marshal IT information, resources, and capabilities effectively.	5	<ul style="list-style-type: none"> <li>■ Articulate, in practical terms, how data drives and supports the mission, integrity, transparency and ethical values of the health center</li> <li>■ Persuasively advocate for the utilization and analysis of health information and data to drive organizational benchmarking, assessment and to establish measurable goals</li> </ul>
	4	<ul style="list-style-type: none"> <li>■ Build good stakeholder relations to establish and enforce effective information and data management objectives and processes health center-wide</li> </ul>
	3	<ul style="list-style-type: none"> <li>■ Scale business and operations opportunities from a data, IT, and information systems perspective, including new products and markets</li> <li>■ Ensure the organization has appropriate processes and roles in place to generate and manage required Operations and regulatory reporting</li> </ul>
	2	<ul style="list-style-type: none"> <li>■ Understand the rationale and requirements for adopting a health information and data management culture</li> <li>■ Interpret data vis-a-vis health center goals and outcomes</li> </ul>
	1	<ul style="list-style-type: none"> <li>■ Learning about the importance of data-driven management practices and the leadership and resources that are needed to support them</li> <li>■ Becoming familiar the health center's data management practices, applications and equipment</li> </ul>

## X. RISK MANAGEMENT, CORPORATE COMPLIANCE, AND ETHICS

*Designing and implementing policies and systematic internal audit and control processes to identify, assess, manage, and mitigate threats or risks to the health center's ongoing operations and overall safety and security; lead risk assessments, claims management, and ensure reporting is accurate and efficient; and assure compliance with all applicable corporate and health center-related laws and regulations.*

SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
<p>1. Establish and maintain comprehensive health center risk management policies and procedures that align with internal policies and all local, state and federal laws and regulations.</p>	<p>5</p>	<ul style="list-style-type: none"> <li>■ Known as a risk management expert for health centers</li> <li>■ Provide risk management leadership on state and national levels</li> <li>■ Work actively with regulatory agencies to identify and inform policy and legislation regarding risk management and compliance measures</li> </ul>
	<p>4</p>	<ul style="list-style-type: none"> <li>■ Proactively identify compliance issues and provide appropriate solutions based on health center policy and procedure</li> <li>■ Strategically develop and implement new policies and procedures to ensure the health center is managing risk effectively in collaboration with health center leaders, Board of Directors and third-party experts</li> <li>■ Develop and/or coordinate risk management workshops and trainings for the health center</li> <li>■ Maintain a high-level oversight of all health center risk and corporate compliance related matters</li> <li>■ Participate in professional resource networks concerned about risk management</li> </ul>




SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
<p>1. Establish and maintain comprehensive health center risk management policies and procedures that align with internal policies and all local, state and federal laws and regulations.</p>	 <p>3</p>	<ul style="list-style-type: none"> <li>■ Lead health center activities under the risk management program, including the establishment and maintenance of all relevant policies and procedures, training, drills, monitoring &amp; reporting systems, event review, and quality improvement</li> <li>■ Use data to guide and improve management of risk in health center operations</li> <li>■ Evaluate health center operations and ensure alignment with policies and procedures</li> <li>■ Establish procedures and oversee processes utilized to resolve conflicts and grievances concerning risk-related events</li> <li>■ Maintain current knowledge of risk management principles and programs</li> <li>■ Maintain current knowledge of confidentiality principles and laws</li> <li>■ Maintain current knowledge of corporate compliance laws and regulations</li> <li>■ Maintain current knowledge of Medicare/Medicaid/third-party payment regulations</li> <li>■ Maintain current knowledge of inspection and accrediting standards, regulations and organizations relevant to the health center</li> <li>■ Maintain current knowledge of patients' rights, laws and regulations</li> </ul>

SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
<p>1. Establish and maintain comprehensive health center risk management policies and procedures that align with internal policies and all local, state and federal laws and regulations.</p>	<p>2</p>	<ul style="list-style-type: none"> <li>■ Identify the fundamental purpose of the compliance regulations and its impact on health center operations</li> <li>■ Demonstrate an understanding and active support of the role health center operations plays in managing risk</li> <li>■ Contribute to the ongoing management and review of health center risk related activities and policy development</li> <li>■ Proactively address risk-related incidences and activities</li> </ul>
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	<p>1</p>	<ul style="list-style-type: none"> <li>■ Learning about current compliance and regulatory issues at the health center</li> <li>■ Learning about current risk policies and procedures, as well as the existing risk management plan</li> <li>■ Learning about risk management programs and processes</li> <li>■ Follow the established risk management policies of the health center</li> </ul>

SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
<p>2. Ensure that the health center successfully adopts ongoing risk management awareness and approaches through ongoing education and the implementation of effective systems to track, analyze, mitigate and prevent risk-related events.</p>	<p>5</p>	<ul style="list-style-type: none"> <li>■ Serve as a recognized leader in risk management strategy</li> <li>■ Facilitate training or workshops on best practices for health center risk management</li> <li>■ Collaborate with public agencies and private organizations to promote safety</li> <li>■ Identify funding for research in patient safety and implementation science</li> </ul>

<p>4</p>	<ul style="list-style-type: none"> <li>■ Ensure health center risk management and compliance practices are in alignment with the most current regulatory standards, policies, and procedures</li> <li>■ Establish and sustain a safety culture; ensure that procedures are in place to identify root causes of safety events and take corrective actions</li> <li>■ Ensure that safety and compliance are embedded into the health center strategic plan and corporate communications</li> <li>■ Establish a common set of safety metrics and reporting that reflect meaningful outcomes</li> <li>■ Establish mechanisms to celebrate staff safety and compliance, e.g., “Good Catch” recognition, venue for sharing safety stories, etc.</li> <li>■ Model and address consistent and effective application of risk management/safety and corporate compliance policies and concepts across the care continuum</li> <li>■ Engage patients and families in the identification of risk and problem solving for solutions to provide for the safest care</li> </ul>
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SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
<p>2. Ensure that the health center successfully adopts ongoing risk management awareness and approaches through ongoing education and the implementation of effective systems to track, analyze, mitigate and prevent risk-related events.</p>	 <p>3</p>	<ul style="list-style-type: none"> <li>■ Apply risk policies and procedures ensuring that team members understand the importance of the health center risk management program</li> <li>■ Establish patient safety as a key metric in the health center’s quality management plans</li> <li>■ Maintain health center risk management database and record-keeping procedures</li> <li>■ Ensure the health center management of credentialing, medical malpractice and professional liability and record-keeping comply with all applicable laws and regulations</li> <li>■ Assure personnel and property security plans and policies are in place</li> <li>■ Manage risk assessments and analyses and continually ensure appropriate actions are taken to address any deficiencies and mitigate risk for patients, staff and health center operations, resources, and facilities</li> <li>■ Ensure health center maintains a current and effective plan for business continuity for all potential emergency events</li> <li>■ Support the healthcare workforce by providing a safe and healthy work environment to optimize safe patient care</li> <li>■ Ensure that technology is secure and optimized to improve patient safety and continuity of care</li> </ul>

SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
<p>2. Ensure that the health center successfully adopts ongoing risk management awareness and approaches through ongoing education and the implementation of effective systems to track, analyze, mitigate and prevent risk-related events.</p>	<p>2</p>	<ul style="list-style-type: none"> <li>■ Support the development of risk and compliance related policies and reports</li> <li>■ Support or lead training on specific risk-related requirements</li> <li>■ Maintain schedule of training for risk management, patient safety, business continuity, etc.</li> <li>■ Support analysis of risk and compliance related data</li> <li>■ Proactively address risk-related incidences and activities while following the health center risk policies and procedures</li> </ul>

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<p>1</p>	<ul style="list-style-type: none"> <li>■ Demonstrate an understanding of the risk management program</li> <li>■ Reactively address risk-related incidences and activities</li> <li>■ Learning about risk management systems and reporting</li> <li>■ Learning about regulatory and health center requirements for credentialing, risk management and corporate compliance</li> </ul>
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SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
3. Negotiate and oversee managed care and health plan, risk-based and accountable care organization contracting.	5	<ul style="list-style-type: none"> <li>■ Successfully adapt clinical workflows to leverage data shared by the Managed Care Organizations (MCO)</li> <li>■ Work with MCO to address risk opportunities</li> </ul>
	4	<ul style="list-style-type: none"> <li>■ Strategically determine potential risks the health centers position with MCO's</li> </ul>
	3	<ul style="list-style-type: none"> <li>■ Demonstrate an in-depth knowledge of terms in risk management contracts</li> <li>Model and predict impact of risk-based contracts</li> </ul>
	2	<ul style="list-style-type: none"> <li>■ Demonstrate knowledge of risk-based contracts and health center metrics</li> </ul>
	1	<ul style="list-style-type: none"> <li>■ Understand the basic fundamentals of managed care concepts to include contract services</li> </ul>

SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
<p>4. Oversee all state and federal regulatory requirements, applications, monitoring and reporting related to and monitoring related to risk management, corporate compliance and ethics (e.g., Medicaid Integrity Program, Federal Tort Claims Act (FTCA) Deeming Application, etc.).</p>	<p>5</p>	<ul style="list-style-type: none"> <li>■ Work on a national level in advocacy or lobbying to limit the use of Recovery Audit Contractors (RAC) as a source of revenue for the federal government, limit the use of the program to identify and penalize fraudulent organizations</li> <li>■ Serve as a CHC's Federal Tort Claims Act (FTCA) Deeming Application expert</li> <li>■ Consult with other health center partners and state/regional/national organizations on the Federal Tort Claims Act (FTCA) Deeming Application process and advice for achieving a successful outcome</li> </ul>

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<p>4</p>	<ul style="list-style-type: none"> <li>■ Proactively monitor internal operations to identify the precursors of fraud and prevent the occurrence of Medicaid fraud</li> <li>■ Strategically work with leadership team to ensure that programmatic efforts within the health center provide on-going support of risk management and quality assurance programs</li> <li>■ Work with the Board to ensure that appropriate policies and procedures are in place to support the health center quality assurance and risk management efforts</li> </ul>
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SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
<p>4. Oversee all state and federal regulatory requirements, applications, monitoring and reporting related to and monitoring related to risk management, corporate compliance and ethics (e.g., Medicaid Integrity Program, Federal Tort Claims Act (FTCA) Deeming Application, etc.).</p>	 <p>3</p>	<ul style="list-style-type: none"> <li>■ Manage the implementation of the risk management program including development of health center policies, staff and vendor training, incident reporting systems, root cause analysis, postmortem and other risk mitigation efforts</li> <li>■ Ensure health center maintains compliance with regulatory agencies, tax status requirements and contractual mandates</li> <li>■ Establish policies and procedures to identify and report instances of Medicaid fraud</li> <li>■ Oversee Medicaid Integrity Program, contractors, and recovery audit contractors</li> <li>■ Oversee the CHC's Federal Tort Claims Act (FTCA) Deeming Application process and requirements</li> <li>■ Capture and record the efforts of the risk management and quality assurance teams to support Federal Tort Claims Act (FTCA) Deeming Application reporting</li> <li>■ Ensure adequate communication from risk and quality team activity and work with the leadership team and Board of Directors</li> <li>■ Assure emergency response plans are in place (and/or business continuity plans that incorporate emergency response) and comply with federal regulations</li> <li>■ Ensure that risk and claims managers are in place and actively assume role within the health center</li> <li>■ Ensure staff are trained on key/relevant aspects of state and federal risk-related programs, and their roles in supporting the implementation of the health center's risk management policies (e.g., tracking requirements, incident reporting, etc.)</li> </ul>



SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
<p>4. Oversee all state and federal regulatory requirements, applications, monitoring and reporting related to and monitoring related to risk management, corporate compliance and ethics (e.g., Medicaid Integrity Program, Federal Tort Claims Act (FTCA) Deeming Application, etc.).</p>	<p>2</p>	<ul style="list-style-type: none"> <li>■ Identify billing inconsistencies and related issues and facilitate correction/resolution</li> <li>■ Effectively gather the data and supporting documentation needed to fulfill each component of the Federal Tort Claims Act (FTCA) Deeming Application</li> </ul>
	<p>1</p>	<ul style="list-style-type: none"> <li>■ Understand basics of healthcare billing</li> <li>■ Understand fraud and error in billing, and the Medicaid Integrity Program</li> <li>■ Identify the components of the CHC's Federal Tort Claims Act (FTCA) application</li> </ul>

## XI. QUALITY IMPROVEMENT

*Designing and implementing policies, procedures and systems to manage, measure, analyze and improve organizational performance via quality improvement, resulting in greater quality of care, efficiency, cost-effectiveness, overall satisfaction and health center recognition. Also includes adhering to quality management requirements of regulatory and quality accrediting bodies [e.g., Health Resources and Services Administration (HRSA), Uniform Data Systems (UDS), Commission on Accreditation of Rehabilitation Facilities (CARF), The Joint Commission (TJC), etc.], and reporting outcomes to stakeholders.*

SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
1. Oversee the development and management of operations quality improvement plans and activities; productively engage relevant stakeholders in the process.	 5	<ul style="list-style-type: none"> <li>■ Recognize suitable accreditations to seek quality designation status (PCMH, Joint Commission), facilitates continuous survey readiness activities</li> <li>■ Able to apply different QI approaches (Model for Improvement, Lean, Six Sigma, Patient safety, etc.) and associated tools to support the needs of the QI team for setting goals, developing/revising and implementing the QI plan</li> <li>■ Certified Professional in Healthcare Quality (CPHQ) certified</li> </ul>
	 4	<ul style="list-style-type: none"> <li>■ Collaborate and network with peers from other organizations to obtain new strategies and work plans</li> <li>■ Utilize efficiency with tools to enhance quality improvement initiatives</li> </ul>
	 3	<ul style="list-style-type: none"> <li>■ Facilitate the development, evaluation, and assessment of current quality improvement plans and introduce new initiatives to contribute to improvements in quality, patient experience, and increase staff satisfaction</li> <li>■ Familiar with quality principles, tools, techniques</li> <li>■ Describe the impact of Social Determinants of Health (SDOH) on health outcomes</li> </ul>

SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
1. Oversee the development and management of operations quality improvement plans and activities; productively engage relevant stakeholders in the process.		<ul style="list-style-type: none"> <li>■ Able to coordinate meetings with the appropriate staff to review and discuss and promote engagement with current quality improvement plans</li> </ul>
		<ul style="list-style-type: none"> <li>■ Obtain resources and materials to learn workflows on quality improvement plans and activities</li> <li>■ Ask for guidance and feedback on progress</li> </ul>

SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
<p>2. Maintain awareness, consideration, and integration of Triple/Quadruple Aim/Quintuple Aim and consider health equity objectives in all quality initiatives [includes quality of healthcare, patient experience, cost efficiency and provider well-being (“Joy in Work”).]</p>	<p>5</p>	<ul style="list-style-type: none"> <li>■ Describe strategies, action steps and examples of a well-coordinated, accessible, affordable, health delivery system</li> <li>■ Obtain and analyze quality metrics and reports from several departments, identify action plans to improve cost, quality and the patient experience</li> <li>■ Participate in the design, development and implementation of Triple/Quadruple/Quintuple Aim processes and learning platforms</li> </ul>
	<p>4</p>	<ul style="list-style-type: none"> <li>■ Monitor trends in overall health and wellbeing of the populations serve by the health center</li> <li>■ Engage in planning for the implementation of best practices in population health with the end-goal of improving patient health outcomes while decreasing healthcare spending within our organization</li> </ul>
	<p>3</p>	<ul style="list-style-type: none"> <li>■ Make recommendations and supports the efforts of providers and practice teams on care delivery interventions resulting in improved health outcomes for patients and cost savings</li> <li>■ Mitigate health disparities by working with providers and practice teams to address social determinants of health (employment, housing stability, insurance status, proximity to services, culturally responsive care)</li> </ul>
	<p>2</p>	<ul style="list-style-type: none"> <li>■ Foster an environment of patient- and family-centered care</li> <li>■ Interpret impact of broad scope organizational change for staff and develops change strategies for successful implementation</li> <li>■ Demonstrate basic understanding of existing health disparities</li> </ul>

SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
<p>2. Maintain awareness, consideration, and integration of Triple/Quadruple Aim/Quintuple Aim and consider health equity objectives in all quality initiatives [includes quality of healthcare, patient experience, cost efficiency and provider well-being (“Joy in Work”).</p>	<p>1</p>	<ul style="list-style-type: none"> <li>■ Track progress of program and prepare status reports to appropriate teams</li> <li>■ Review and analyze workflows to identify current or potential barriers</li> <li>■ Obtain resources and materials to learn about Social Determinants of Health (SDOH) and their impact on healthcare outcomes</li> </ul>

SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
<p>3. Coordinate/collaborate with health center leaders on annual HEDIS/UDS reporting, progress report submission process, population health information, including oversight of vendor data collection, analysis, and auditing.</p>	<p>5</p>	<ul style="list-style-type: none"> <li>■ Monitor projects from inception through delivery</li> <li>■ Serve as the subject matter expert in the functional area and leads programs to meet HEDIS interventions</li> <li>■ Lead the creation of business requirements documents, reportable date plans, user training materials and other related documentations</li> <li>■ Lead the teams to focus on prospective activities that offer greater opportunity to intervene and impact and promote improvement, i.e., year-round data retrieval/analysis and process improvement</li> </ul>
	<p>4</p>	<ul style="list-style-type: none"> <li>■ Manage annual/year-round HEDIS/UDS data collection/review activities</li> <li>■ Work with operational leaders within the business to provide recommendations on opportunities for process improvements</li> <li>■ Establish operational/strategic support in planning, coordinating, and validating data, reviews and outcomes</li> </ul>
	<p>3</p>	<ul style="list-style-type: none"> <li>■ Collaborate with department or cross-functional teams of subject matter experts, to ensure the measuring, reporting and continuous improvement of healthcare analytics</li> <li>■ Utilize data and information regularly to improve individual, program and organizational performance (i.e., selection and use of valid and reliable quantitative and qualitative data, data-driven decision making, data management, and performance measurement)</li> </ul>
	<p>2</p>	<ul style="list-style-type: none"> <li>■ Collaborate actively with department staff (i.e., billing, QI, IT and Operations) who are responsible for internal business projects and programs</li> </ul>
	<p>1</p>	<ul style="list-style-type: none"> <li>■ Focus on process improvement, organizational change management, program management and other processes relative to the business</li> </ul>

SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
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4. Ensure compliance with organizational, state licensing standards and national healthcare accreditation requirements.

5

- Serve on committees, working groups and/or boards of state and national healthcare accrediting boards and organizations concerning the development, enforcement, and training for accreditation and monitoring standards
- Interpret licensing standards and accreditation requirements to local, state, and national stakeholders

4

- Ensure the health center’s Compliance Program prevents and/or detects violations (e.g., mock audits)
- Ensure internal controls prevent and detect significant instances or patterns that are out of compliance
- Formalize and monitor a system to enable employee reporting of noncompliance without fear of retribution
- Ensure that the compliance reporting system is adequately publicized and that allegations of noncompliance are investigated and responded to promptly
- Frequently review the regulatory requirements and recommend appropriate revisions and modifications to the health center compliance program, including advising administrative leadership and the Board of Directors of potential compliance risk areas

SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
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5. Create policies and standard operating procedures for corrective action and quality improvement based on organization-wide compliance and audit initiatives.

5

- Contribute to the development and dissemination of information, training and resources to support health center development of effective quality improvement policies and corrective action
- Consult with other health centers, local, state and/or national organizations on the optimization of Quality Improvement (QI) programs/systems, including policies and procedures that integrate current professional standards and practices and health center policies
- Maintain a high level of education on new and updated regulations
- Lead the health center completion of the annual Federal Tort Claims Act (FTCA) Deeming Application

4

- Ensure compliance with regulations and controls by regularly examining and analyzing records, reports, operating practices, and documentation; and recommending opportunities to strengthen the internal control structure with other department leaders
- Discuss accreditation standards and requirements to maintain
- compliance across all health center payers with pertinent departments
- Obtain cooperation from senior management, department management, and department staff, as necessary, to identify and obtain documentation, conduct interviews, etc.
- Work with Compliance Committee to complete annual Federal Tort Claims Act (FTCA) Deeming Application
- Update knowledge of QI by participating in educational opportunities like reading professional publications, maintaining personal networks, and participating in professional organizations



SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
<p>5. Create policies and standard operating procedures for corrective action and quality improvement based on organization-wide compliance and audit initiatives.</p>	<p>3</p>	<ul style="list-style-type: none"> <li>■ Prepare department managers and staff in advance of any scheduled audit; highlight specific areas of focus and risk considerations</li> <li>■ Develop and manage an Annual Internal Audit Unit/Process and Plan to evaluate the expected scope of the audit and current management concerns; implement a plan to take corrective actions proactively</li> <li>■ Work with Compliance Officer to manage and enforce an effective legal compliance program that aligns with federal and state laws</li> <li>■ Create a plan to review policies, procedures, and forms within each department to maintain compliance of auditable programs, annually, at minimum</li> <li>■ Learning about the importance and processes required to successfully complete the Federal Tort Claims Act (FTCA) Deeming Application, and supporting the process</li> </ul>
	<p>2</p>	<ul style="list-style-type: none"> <li>■ Assemble management reports by collecting, analyzing, and summarizing information and regularly disseminate to appropriate leadership members</li> <li>■ Understand fundamental compliance requirements for payers, funders, and regulators</li> </ul>
	<p>1</p>	<ul style="list-style-type: none"> <li>■ Interpret, evaluate, and contribute to company policies, with a clear understanding of each</li> <li>■ Learning about and support all auditing bodies and reporting processes/timelines as requested</li> </ul>

SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
<p>6. Evaluate the operations department structure, policies, processes, and organizational impact for continual improvement of the efficiency and effectiveness of the group and provide opportunities for professional growth of individuals.</p>	<p>5</p>	<ul style="list-style-type: none"> <li>■ Share information on optimal and effective structures and systems for continual quality improvement of operations in health centers</li> <li>■ Advocate for standards and funding to support health center quality initiatives</li> <li>■ Contribute to the development of learning opportunities related to health center quality</li> <li>■ Lead ongoing innovation and continuous improvement of business processes, products, and member service delivery channels keeping in mind current healthcare climate and stakeholder needs</li> </ul>

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<p>4</p>	<ul style="list-style-type: none"> <li>■ Provide operational oversight and resource management by developing, creating, and executing on established strategies that contribute to and support the overall growth and success of the organization</li> <li>■ Demonstrate health center-wide understanding of quality improvement goals and activities</li> <li>■ Manage and take accountability for all department decisions affecting the quality of operations</li> <li>■ Hold teams accountable for meeting all service level agreements with all stakeholders, ensure the team's work is accurate/efficient, and provide coaching, feedback, and/or training as needed</li> <li>■ Lead change by identifying opportunities that consistently raise the bar and improve service levels</li> </ul>
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SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
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6. Evaluate the operations department structure, policies, processes, and organizational impact for continual improvement of the efficiency and effectiveness of the group and provide opportunities for professional growth of individuals.

3

- Provide, encourage, and ensure development opportunities are available for team members as part of their overall career path
- Participate in strategic planning meetings with Board and Leadership to define the short- and long-term growth and defining the strategy, direction, and objectives for the organization
- Meet regularly with each team members to coach and mentor to ensure alignment around the organization’s mission, vision, and values, while leading by example
- Establish and maintain processes needed to ensure compliance with regulatory requirements, payor guidelines, federal, and state laws
- Provide team members with training, tools, resources, and support to successfully perform their jobs
- Available to team members should questions arise around all things related to operational quality and know who to go to if unable to answer

2

- Support the QI program through utilizing QI tools, creating and interpreting reports
- Understands common questions concerning quality, researches and supports getting answers
- Aware of quality-related challenges and successes; communicates observations to management

1

- Learning about the health center’s commitment to quality improvement
- Gaining experience participating in the health center’s QI processes

SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
<p>7. Coordinate/collaborate with health center leaders to ensure utilization of proven quality tools and techniques to foster continual improvement in operations management (e.g., quality assessments, guidelines analysis, “Plan, Do, Study, Act (PDSA) cycles,” peer review, outcomes/performance management, benchmarking, LEAN Management, etc.); actively participate (self and operations team) in the health center’s Quality Management program.</p>	<p>5</p>	<ul style="list-style-type: none"> <li>■ Champion quality improvement efforts, promote a results orientation, and lead by example (“walking the walk”)</li> <li>■ Educate and coach professional colleagues</li> <li>■ Develop persuasive arguments to educate stakeholders, including Board members, of the importance of operational quality benchmarks for ongoing CQI to support the mission, vision, and values</li> <li>■ Creatively integrate utilization of principles of quality management from various schools of thought to affect more comprehensive and impactful planning and implementation</li> </ul>

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<p>4</p>	<ul style="list-style-type: none"> <li>■ Able to lead the health center in the creation of a culture of continuous improvement – do all things with excellence</li> <li>■ Coach health center leaders through the improvement process, listening to their concerns and valuing their opinions, especially those with hands on knowledge and experience</li> <li>■ Obtain different perspectives from leaders/staff to make more accurate assessments when making decisions</li> <li>■ Collaborate with other health center leaders on the joint development of quality indicators and processes</li> </ul>
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SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
<p>7. Coordinate/collaborate with health center leaders to ensure utilization of proven quality tools and techniques to foster continual improvement in operations management (e.g., quality assessments, guidelines analysis, “Plan, Do, Study, Act (PDSA) cycles,” peer review, outcomes/performance management, benchmarking, LEAN Management, etc.); actively participate (self and operations team) in the health center’s Quality Management program.</p>	<p>3</p>	<ul style="list-style-type: none"> <li>■ Discuss effective quality improvement tools and methodologies with management and work to adopt those that will support Continuous Quality Improvement (CQI)</li> <li>■ Select the most appropriate quality improvement tool, or combination of tools to address the situation at hand</li> <li>■ Establish reporting and tracking processes, perform and share consistently</li> <li>■ Solve problems effectively and efficiently using proven quality improvement tools</li> <li>■ Work with the CFO to communicate the rationale for tracking indicators to monitor quality of financial operations across all health center sectors</li> <li>■ Work with CFO to develop financial quality indicators and goals for the health center that integrate requirements of outside stakeholders with internal processes</li> </ul>
	<p>2</p>	<ul style="list-style-type: none"> <li>■ Support the creation of a culture of continuous improvement – do all things with excellence</li> <li>■ Articulate the application of proven quality improvement tools, how to utilize them, and how they will support the mission, vision, and values of the organization</li> </ul>
	<p>1</p>	<ul style="list-style-type: none"> <li>■ Possess a basic knowledge of quality tools available, metrics used within each, and techniques used for reporting</li> <li>■ Seek educational opportunities to learn more about quality improvement and operations, including attending seminars and workshops</li> <li>■ Understand the methods for collecting data and participate in collecting reports, aggregating results, analyzing data, and disseminating to appropriate leaders</li> </ul>

SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
<p>8. Communicate quality improvement plans and results with departments and the organization at large, share milestone achievements and setbacks - both large and small - and recognize exemplary performance.</p>	<p>5</p>	<ul style="list-style-type: none"> <li>■ Share quality achievements and how they were accomplished with other health centers and health organizations</li> <li>■ Consult with other health organizations on the development of effective systems for reporting and managing quality</li> </ul>

<p>4</p>	<ul style="list-style-type: none"> <li>■ Establish a formal process to regularly communicate results of quality improvement efforts and plans to improve quality to all stakeholders using readily understood language and presentation format</li> <li>■ Develop a health center-wide process to communicate and recognize top department/ cross-functional team performances in quality management</li> <li>■ Assure that important quality improvement measures and outcomes are captured on a centralized dashboard so that progress on quality goals can be visualized and efficiently communicated with stakeholders</li> <li>■ Effectively communicate and present quality improvement plans and findings to Board of Directors, CQI Committee, Department Leads, and other C-Suite Members, breaking down concepts to help others easily understand, while bringing awareness to importance</li> <li>■ Able to articulate why information in the quality improvement dashboard is critical to monitor and manage to assure quality</li> <li>■ Educate/guide and offer support/assistance to departments that are not meeting their quality objectives</li> </ul>
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SKILLS/TASKS	LEVEL	BEHAVIORAL EXAMPLES
<p>8. Communicate quality improvement plans and results with departments and the organization at large, share milestone achievements and setbacks - both large and small - and recognize exemplary performance.</p>	<p>3</p>	<ul style="list-style-type: none"> <li>■ Conduct root cause analyses with department leads on quality issues and establish corrective action plans as needed</li> <li>■ Monitor and follow up regularly with any current plans of correction</li> <li>■ Develop department-based activities to celebrate the achievement of quality objectives and recognize individual contributions</li> </ul>
	<p>2</p>	<ul style="list-style-type: none"> <li>■ Understand the goals and measures of the health center's quality improvement program by department, and how operations supports the achievement of these goals</li> <li>■ Understand reporting systems and mechanisms for creating reports on health center quality</li> <li>■ Manage or generate ad hoc reports</li> <li>■ Contribute to the production of communications, media, and/or training related to health center quality</li> </ul>
	<p>1</p>	<ul style="list-style-type: none"> <li>■ Learning about various department specific quality improvement plans and requirements with an understanding of how they tie into the overall organization mission</li> </ul>

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## **APPENDIX 1**

# **Acronyms/Jargon/Abbreviations**

<b>ACHE</b>	American College of Healthcare Executives
<b>ADR</b>	Alternative Dispute Resolution
<b>AHA</b>	American Hospital Association
<b>BCP</b>	Business Continuity Plan
<b>CARF</b>	Commission on Accreditation of Rehabilitation Facilities
<b>CDC</b>	Centers for Disease Control
<b>CEO</b>	Chief Executive Officer
<b>CFO</b>	Chief Financial Officer
<b>CFR</b>	Code of Federal Regulation
<b>CHC</b>	Community Health Center
<b>COO</b>	Chief Operations Officer
<b>CPHQ</b>	Certified Professional in Healthcare Quality
<b>CQI</b>	Continuous Quality Improvement
<b>C-Suite</b>	Chief Executive Team
<b>EAP</b>	Employee Assistance Program
<b>EHR</b>	Electronic Health Record
<b>EOC</b>	Emergency Operations Center
<b>EOC</b>	Employer of Choice
<b>EOC</b>	Environment of Care
<b>FFR</b>	Federal Finance Report
<b>FQHC</b>	Federally Qualified Health Center
<b>FTCA</b>	Federal Tort Claims Act
<b>GAAP</b>	Generally Accepted Accounting Principles
<b>G/L</b>	General Ledger
<b>HEDIS</b>	Health Effectiveness Information Data Set
<b>HIT</b>	Health Information Technology
<b>HPSA</b>	Health Professional Shortage Areas
<b>HR</b>	Human Resources



<b>HRSA</b>	Health Resources and Services Administration
<b>IPA</b>	Independent Physician Association
<b>IT</b>	Information Technology
<b>KPI</b>	Key Performance Indicators
<b>Lean</b>	Lean management processes
<b>MCO</b>	Managed Care Organization
<b>MOU</b>	Memorandum of Understanding
<b>MUP</b>	Medically Underserved Populations
<b>NACHC</b>	National Association of Community Health Centers
<b>OSHA</b>	Occupational Safety and Health Administration
<b>OSV</b>	O
<b>P&amp;P</b>	Policies & Procedures
<b>PCA</b>	Primary Care Association
<b>PCMH</b>	Patient-Centered Medical Home
<b>PDSA</b>	Plan, Do, Study, Act (Institute for Healthcare Improvement method of quality improvement)
<b>PM</b>	Practice Management
<b>PTO</b>	Paid Time Off
<b>QI</b>	Quality Improvement
<b>Q</b>	Q
<b>RAC</b>	Recovery Audit Contractor
<b>SDOH</b>	Social Determinants of Health
<b>SMART Goals</b>	Specific, Measurable, Achievable, Relevant, Time-bound
<b>SME</b>	Subject Matter Expert
<b>SRA</b>	Security Risk Assessments
<b>SWOT</b>	Strengths, Weaknesses, Opportunities and Threats
<b>TJC</b>	The Joint Commission
<b>UDS</b>	Uniform Data Systems

## **APPENDIX 2**

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# **ACHE Healthcare Executive 2023 Competencies Tool Modifications for Health Center COOs**

The following adaptations were made to the structure of the ACHE tool to enhance application for health center COOs:

## **KNOWLEDGE OF THE HEALTHCARE ENVIRONMENT**

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Knowledge of the Healthcare Environment is defined as the understanding of the healthcare system and the environment in which healthcare managers and providers function. These skills and tasks are integrated as applied skills throughout the domains to reflect more accurately the functional roles of the health center COO.

## **BUSINESS SKILLS & KNOWLEDGE**

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- **Operations Management**

Added to reflect the multi-faceted and integral role of the COO throughout health center operations.

- **General Management**

General Management skills and tasks are integrated as applied skills throughout the domains to reflect more accurately the functional roles of the health center COO.

- **Financial Management**

Financial management competencies are functionally integrated into the Business Skills and Knowledge Domains.

- **Organizational Dynamics and Governance**

Organizational Dynamics and Governance competencies are functionally integrated into the Communication and Relationship Management and Leadership domains.

- **Patient Safety**

Patient Safety competencies are functionally integrated into the Operations Management and Risk Management domains.

## APPENDIX 3

# COO Competencies Working Group Members, 2021–23

WORKING GROUP MEMBERS		
<p><b>Karina Aguilar</b> Director of Operations IWS Family Health Chicago, IL</p>	<p><b>LaLaesha Black</b> Chief Operations Officer Heart City Health Elkhart, IN</p>	<p><b>Natasha Chatman, M.Ed.</b> Chief Operating &amp; Compliance Officer Fetter Health Care Network Charleston, SC</p>
<p><b>Shane Chen</b> Chief Operating Officer Asian American Health Coalition of Greater Houston, Inc./HOPE Clinic Houston, Texas</p>	<p><b>Denise Gonzalez</b> Chief Operating Officer IWS Family Health Chicago, IL</p>	<p><b>Jennifer Henry, MBA, BSN, RN</b> Chief Executive Officer Promise Healthcare Champaign, IL</p>
<p><b>Erica Johnson, MBA, MHA, BSN, RN, CHEC</b> Chief Operating Officer Hampton Roads Community Health Center Portsmouth, VA</p>	<p><b>Brooke Lattimore, MBA</b> Chief Operating Officer Health &amp; Wellness Center, Inc. Stigler, OK</p>	<p><b>Gigina Lewis, MPH</b> Chief Operating Officer Rural Health Services, Inc. Aiken, SC</p>
<p><b>Preethi Raghu, MS-HCA, MBA, PMP</b> Chief Operating Officer Community Medical Centers Stockton, CA</p>	<p><b>Alfredo Reynoso</b> Chief Operations Officer Universal Community Health Center Los Angeles, CA</p>	<p><b>Jose Simmons, M.S.Ed., MSW, ACSW, LCSW-C</b> Chief Operating Officer Total Health Care, Inc. Baltimore, MD</p>
<p><b>Louis D. Simmons, MHA, FACHE, CMPE</b> Chief Operating Officer Meridian Education Resource Group, Inc., dba, Whitefoord, Inc. Atlanta, GA</p>	<p><b>Tracy L. Simmons</b> Chief Operating Officer Katy Trail Community Health Sedalia, MO</p>	<p><b>Stephanie J. Wroten, RN, MSN, MS, LNC</b> Chief Operating Officer Roanoke Chowan Community Health Center Ahoskie, NC</p>
STAFF		
<p><b>Brandon L. Jones, MHA</b> Director, Health Center Operations &amp; HR Training National Association of Community Health Centers Bethesda, MD</p>	<p><b>Phillip Stringfield, M.S.</b> Manager, Health Center Operations, Training Training and Technical Assistance (T/TA) National Association of Community Health Centers Bethesda, MD</p>	<p><b>Danielle T. Lundgren, MPH</b> Specialist, Health Center Operations and Ancillary Services National Association of Community Health Centers Bethesda, MD</p>
<p><b>Y. Denise Mayhan, Ph.D.</b> COO Competencies Project Manager Chief Executive Officer Inspired Solutions Enterprises Atlanta, GA</p>		