

# CHIEF EXECUTIVE OFFICER (CEO) COMPETENCIES DOMAINS AND SKILLS/TASKS

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**Health Center Chief Executive Officer (CEO)  
Core Competencies and Professional Self-Development Tool:  
Introduction & Guidelines**

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## BACKGROUND

Defining health center Chief Executive Officer (CEO) Core Competencies has been a work in progress within NACHC since 2017. Health center leaders from across the country, representing various positions which often interact with the CEO role, comprised an Advisory Committee charged with developing a comprehensive set of health center CEO work role Domains, related Tasks/Skills, and descriptive Behavioral Examples (see Definitions, below).

The intent was to create a taxonomy of competencies as a foundation for defining multiple aspects of capable CEO leadership. The result is a tool that is organic – that is, it is subject to continuous quality improvement and regular updating as CEO practice evolves and as feedback on the tool itself is analyzed.

Since this tool was designed to be comprehensive and generalizable, we do not suggest adopting the entire document as a strict standard of performance for executive leadership of a health center. Competence is situational; each health center presents its own unique set of challenges and opportunities a CEO must master to achieve high performance.

The tool is appropriate for a wide variety of stakeholders, including health center CEOs and other C-Suite leaders, health center boards, Human Resources officers, search firms, Primary Care Associations (PCAs), training organizations, and more. Our hope is that it will provide both a structure and a common language that will help define, develop, and sustain true excellence in the executive leadership of all health centers.

Recommended uses for this tool are as follows:

- As a comprehensive taxonomy of CEO competencies from which a health center's leadership team can identify Domains, Tasks/Skills, and Behaviors generally needed for successful executive leadership;
- As a self-assessment tool for current and aspiring CEOs (as well as other organizational leaders) in evaluating functional levels of competence, and in identifying specific areas needing development for the leader to fully achieve personal and professional career objectives;
- As a reference point around which CEOs and health center boards can engage health center leaders in structured conversations about professional strengths and learning needs, to enable personalized professional development plans;
- As a comprehensive resource for developing position descriptions and related interview questions for CEO candidates;
- As a compendium of roles and responsibilities to guide search firm criteria for CEO candidates;
- As a resource for constructing performance review criteria for existing health center CEOs; and
- As a tool for generating relevant training/learning experiences and resources for CEOs.

Conversely, this tool is not intended for use:

- To strictly define the role of, and expectations for, all health center CEOs - using the document this way can create unreasonable performance expectations that are not always relevant to specific needs of individual centers;
- As sole – or even primary – justification for discharging a current executive (CEO, Executive Director, etc.), or for disqualifying a candidate for such positions; or
- As a yardstick for measuring the overall organizational performance of a health center.

## DEFINITIONS

**Chief Executive Officer (CEO):** The lead member of the management team, who drives ethical, strategic, sustainable, and mission-centered operations and business development for the health center and its stakeholders. The CEO’s job will look slightly different in every organization – and that’s fine. This is not a cookie-cutter role, nor should it be. But there are fundamental parts of the position that are likely to be common to most health centers. These primary functions, as organized into 12 key Domains (and briefly summarized below) are described in detail in the Core Competencies document itself.

**Domains:** The broad functions – and thus the major areas of needed competence – for which the health center CEO is responsible/accountable. The 12 key Domains are as follows:

- General Operations:* The CEO must understand the health center movement/model; the impact of the current health care environment on the center and its patients; how to work fluidly with government agencies, funders, and other critical entities; and how to foster a positive community image.
- Systems Orientation:* The CEO needs to maintain both productive external relationships and partnerships, and an internal environment in which staff and board work together to successfully address the organization’s Strategic Plan. The CEO must employ both “big picture” and “detailed systems” thinking in making organizational decisions based in the center’s mission/vision/values.
- Cultural Sensitivity:* The CEO ensures an environment in which cultural diversity, equity, and inclusion are givens, and in which sensitivity to differing cultures, behaviors, and wellness perspectives is the norm.
- Personnel Management and Teamwork:* CEOs must ensure that recruiting, onboarding, retention, general personnel management, and human resources compliance are successfully carried out. They must foster genuine teamwork and a sense of common purpose among all staff, through delegation, decision-making, clear job descriptions, and team collaboration which ensures that tasks are completed efficiently and with respect for all. The CEO works in partnership with Human Resources to ensure effective staff engagement and development that fosters optimal professional opportunities for future leaders.

- E. *Operational Management*: The CEO must work in partnership with other health center operational leaders and managers to ensure full alignment of people, processes, and places, supporting appropriate operational and clinical responses to a changing environment.
- F. *Finance and Reimbursement*: CEOs must fully understand budgets, cash flow analyses, income statements, and balance sheets. They also need to understand 990 tax returns, federal grant regulations, 340B regulations, audits, and compliance principles. The CEO works in partnership with the CFO in creating, and ensuring adherence to, appropriate financial policies and controls.
  - a. An important financial component is ongoing fund development for organizational sustainability. The CEO must ensure continual and diverse revenue streams (grants, fundraising events, major donor/foundation contributions, etc.) by creating conditions that enable fund development success. The CEO cannot wholly delegate these activities as potential donors and the community will want to interact personally with the CEO.
- G. *Quality Management*: According to the Institute of Medicine<sup>1</sup>, quality health services are “safe, effective, patient centered, timely, efficient, and equitable”. The CEO supports and participates in quality management and related programs, including accreditation and Patient Centered Medical Home (PCMH) recognition, which foster continual health center improvement.
- H. *Health Information Technology (HIT)*: The CEO ensures (generally through oversight rather than direct engagement) appropriate use of EHRs, PMSs, and advanced HIT applications to optimize quality of care, center operations, and reimbursement.
- I. *Legal and Ethical Issues*: CEOs lead through personal integrity, respect for all, and clear commitment to excellence, and they ensure the same from all staff. A CEO must also ensure successful Risk Management awareness and action, as well as ongoing compliance with both the Federal Tort Claims Act and all grant requirements.
- J. *Advocacy*: A CEO must develop and maintain strong relationships with professional peers, donors, industry association colleagues, media representatives, and more. Transparency and coalition building are critical, as is regular communication with direct stakeholders and the general public. The CEO will need to maintain awareness of all advocacy rules related to federal fund sources and must guide staff and board in taking an active role in community mobilization for health.
- K. *Resiliency and Joy in Work*: CEOs must successfully undertake and navigate change, and they must provide support to staff as the center addresses new initiatives and care models. In addition, CEOs must successfully promote true joy in work, both personally and for the health center staff, in part by leveraging Emotional Intelligence theory.

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<sup>1</sup> <https://www.ncbi.nlm.nih.gov/pmc/articles/PMC6561897>

- L. *Leadership*: “Leadership” encompasses all other Domains. As the public face of the health center, the CEO is seen by all stakeholders as the visible embodiment of the entity. The CEO must articulate the mission/vision/values, change principles, needs, and overarching strategy of the organization. CEOs also foster positive board partnership, accountability, and a sense of complementary roles with interlocking responsibilities. Finally, CEOs have ultimate responsibility for their centers, but they are not responsible for doing all tasks; rather, they delegate appropriately.

**Tasks/Skills:** Specific responsibilities comprising each broad Domain.

**Behavioral Examples:** Observable actions that help differentiate proficiency levels for each Task/Skill.

**Proficiency Levels:** Loosely based on the seminal work of Dreyfus & Dreyfus<sup>2</sup>. CEOs should minimally attain “Level 3 – Competent/Applied” proficiency for skills that help ensure successful health center leadership. See Table 1 on the following page for defined proficiency levels.

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<sup>2</sup> 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>)

**Table 1: Proficiency Levels**

Proficiency Level		Description
5	Expert	<p>Performance at the Expert level demonstrates deep experiential background that enables assessment of, and response to, situations/events by identifying critical issues and implementing optimal courses of action. Able to be innovative, creative, and highly effective in multiple situations, including those that are new, or which require deep problem-solving or analytic skill. Creates and/or shares new knowledge and demonstrates promising practices.</p> <p><u>Key Descriptors:</u> Develops and applies skills/knowledge/behaviors in new and unique ways; Innovative, intuitive, with a national/global perspective; Focuses on trends, strategies, external partnerships, and enhancing knowledge/insight of colleagues and constituents; Demonstrates foresight.</p>
4	Proficient/ Skilled	<p>Performance at the Proficient/Skilled level demonstrates significant experience. Sees situations holistically, and intuitively understands the interdependence and prioritization of multiple aspects of situations. Able to instinctively apply maxims and successful strategies to situations as they present themselves. Possesses multiple tools in the “professional toolbox” and knows how to use them well.</p> <p><u>Key Descriptors:</u> Demonstrates advanced skills/knowledge/behaviors; Handles complex situations successfully; Coaches others; Proactive and efficient; Focuses on organization-wide performance; Demonstrates insight.</p>
3	Competent/ Applied	<p>Performance at the Competent/Applied level displays enough experience to complete most tasks independently, understand the larger context, and attend to multiple aspects of situations (but may still occasionally become overwhelmed by them). Able to plan, organize, and prioritize with some effort, but may lack the speed and flexibility of more advanced professionals in a particular area. Able to establish productive routines. May require supervision/coaching for novel or complex tasks and situations.</p> <p><u>Key Descriptors:</u> Reliable and independent; Performs task/skills consistently and well.</p>
2	Beginner/ Basic	<p>Performance at the Beginner/Basic level demonstrates at least some experience in some situations and reflects initial stages of understanding the complexities of situations. Requires significant supervision/coaching/support to prioritize and complete most tasks successfully; may be able to complete a few tasks with minimal oversight. May have difficulty seeing the “big picture” or critical aspects of a situation, focusing on less complicated and potentially disconnected aspects.</p> <p><u>Key Descriptors:</u> Partially independent, needing some coaching/supervision; Focuses on understanding the role and learning relevant information; May perform tasks at a basic level.</p>
1	Novice/ Learning	<p>Performance at the Novice/Learning level may demonstrate “book” knowledge of Domains and Tasks/Skills, but with relatively little experiential knowledge. May rely heavily on context-free rules and objective data, applying them universally with minimum discernment. Requires a significant amount of supervision and coaching to complete tasks at an acceptable level.</p> <p><u>Key Descriptors:</u> Book knowledge only, or limited awareness of tasks and required skills/knowledge. Reliance on strict rules; Needs ongoing supervision/coaching/training; Focuses on general skills and knowledge; In the early development stage.</p>

## CORE COMPETENCIES

### A. General & Basic Operations

The CEO must understand the health center movement/model; the impact of the current health care environment on the center and its patients; how to work fluidly with government agencies, funders, and other critical entities; and how to foster a positive community image.



**A1. Able to work fluidly with governmental agencies, legislative representatives, and other entities and individuals that fund and/or support health centers**

Level	Examples
<b>5 - Expert</b>	<ul style="list-style-type: none"> <li>• Create innovative approaches to navigating and leveraging relationships with government entities and other funding sources supporting health centers</li> <li>• Anticipate how changes in legislation may impact health center operations</li> <li>• Demonstrate Skilled behaviors</li> </ul>
<b>4 - Skilled</b>	<ul style="list-style-type: none"> <li>• Leverage governmental and other funding agency structures and initiatives, to create new opportunities for service expansion</li> <li>• Coach others on how to navigate and leverage relationships with government agencies that fund/support health centers</li> <li>• Demonstrate Applied behaviors</li> </ul>
<b>3 - Applied</b>	<ul style="list-style-type: none"> <li>• Help develop current project and funding applications</li> <li>• Assist with periodic reporting</li> <li>• Communicate as needed on related issues and opportunities</li> <li>• Demonstrate Basic behaviors</li> </ul>
<b>2 - Basic</b>	<ul style="list-style-type: none"> <li>• Understand governmental/funding source structures, relationships, and mandates pertaining to health centers, including HRSA <i>Health Center Program Compliance Manual</i> requirements</li> </ul>
<b>1 - Learning</b>	<ul style="list-style-type: none"> <li>• Aware of the need to work with governmental and other funding sources, but unsure how they impact the health</li> </ul>

## **A2. Continuously build knowledge and expertise through industry networks**

<b>Level</b>	<b>Examples</b>
<b>5 - Expert</b>	<ul style="list-style-type: none"> <li>• Take active leadership role in State and Regional Primary Care Association (PCA) functions, and NACHC forums / projects</li> <li>• Develop innovative approaches for identifying and building relationships with thought leaders in relevant industry associations</li> <li>• Demonstrate Skilled behaviors</li> </ul>
<b>4 - Skilled</b>	<ul style="list-style-type: none"> <li>• Coach other members of the health center team on the importance of continuously building knowledge/expertise through appropriate professional networks</li> <li>• Participate in industry working groups</li> <li>• Demonstrate Applied behaviors</li> </ul>
<b>3 - Applied</b>	<ul style="list-style-type: none"> <li>• Routinely participate in relevant PCA, NACHC, and other network activities</li> <li>• Continuously expand network of industry contacts</li> <li>• Demonstrate Basic behaviors</li> </ul>
<b>2 - Basic</b>	<ul style="list-style-type: none"> <li>• Understand PCAs, HCCNs, NACHC, other National Cooperative Agreements (NCAs), and additional relevant networks and their relationships</li> <li>• Have a minimal network of industry contacts</li> </ul>
<b>1 - Learning</b>	<ul style="list-style-type: none"> <li>• Aware of State and Regional PCAs and NACHC, but no or limited involvement in their activities/programs</li> <li>• Have not yet established a network of industry contacts</li> </ul>

### **A3. Demonstrate comprehensive understanding of the unique dynamics of the health center model**

Level	Examples
<b>5 - Expert</b>	<ul style="list-style-type: none"> <li>• Take a leadership role in actively advancing national health center priorities</li> <li>• Serve as expert resource to other health centers in advancing Board engagement and effectiveness</li> <li>• Demonstrate Skilled behaviors</li> </ul>
<b>4 - Skilled</b>	<ul style="list-style-type: none"> <li>• Can explain the forces shaping delivery of health care, and how that will impact health centers, for a 5-10 year horizon</li> <li>• Facilitate the Board's ability to fulfill its fiduciary role by actively fostering positive, creative Board interaction/engagement</li> <li>• Demonstrate Applied behaviors</li> </ul>
<b>3 - Applied</b>	<ul style="list-style-type: none"> <li>• Can explain to staff how health centers fit into local/national health systems</li> <li>• Can describe the dynamics of the overall health care system, at all levels</li> <li>• Successfully leverage the diverse skills and perspectives on the consumer-based Board</li> <li>• Demonstrate Basic behaviors</li> </ul>
<b>2 - Basic</b>	<ul style="list-style-type: none"> <li>• Know common health center terminology and appropriate government acronyms</li> <li>• Know health center reporting requirements</li> <li>• Know the history of the health center movement</li> <li>• Understand and fully appreciate the unique requirements for health center Board composition</li> </ul>
<b>1 - Learning</b>	<ul style="list-style-type: none"> <li>• Working to understand history of the health center movement, unique health center dynamics (including composition/role of the consumer-based Board), and the role and impact - including economic - of the center within its community</li> </ul>

**A4. Ensure a positive health center image within the community and among external constituencies via marketing opportunities, social media, personal influence, and public presentations**

Level	Examples
<b>5 - Expert</b>	<ul style="list-style-type: none"> <li>• Write regular blogs, social media entries, articles, etc. concerning primary care issues and how the center is helping address them</li> <li>• Often requested to speak at industry events</li> <li>• Demonstrate Skilled behaviors</li> </ul>
<b>4 - Skilled</b>	<ul style="list-style-type: none"> <li>• Lead discussions on relevant social media channels concerning health issues facing the community</li> <li>• Coach others on how to leverage social media and other marketing channels to enhance the image of the health center within the community</li> <li>• Demonstrate Applied behaviors</li> </ul>
<b>3 - Applied</b>	<ul style="list-style-type: none"> <li>• Actively initiate presentations that effectively represent the center and the health center model to constituent groups and other external parties, to advance the mission and leverage new opportunities</li> <li>• Use LinkedIn and other relevant social media channels to expand personal presence in the community</li> <li>• Establish a personal “brand” by making effective presentations to internal and external groups, writing for publication, etc.</li> <li>• Demonstrate Basic behaviors</li> </ul>
<b>2 - Basic</b>	<ul style="list-style-type: none"> <li>• Can articulate basic public relations principles (marketing, social media, etc.)</li> <li>• Have basic presentation skills and ability to use common presentation software</li> </ul>
<b>1 - Learning</b>	<ul style="list-style-type: none"> <li>• Aware of the importance of marketing the value and capabilities of the center to the community, but little experience in related communications approaches</li> </ul>

## A5. Ensure successful UDS completion

Level	Examples
<b>5 - Expert</b>	<ul style="list-style-type: none"> <li>• Generate innovative approaches to ongoing use of UDS data to improve center operations and results</li> <li>• Serve as a resource to other health centers on UDS data and resulting improvement</li> <li>• Demonstrate Skilled behaviors</li> </ul>
<b>4 - Skilled</b>	<ul style="list-style-type: none"> <li>• Coach others on accurate completion of UDS reports</li> <li>• Provide leadership for improving organizational performance based on UDS results, as a foundation for ongoing grants</li> <li>• Demonstrate Applied behaviors</li> </ul>
<b>3 - Applied</b>	<ul style="list-style-type: none"> <li>• Routinely provide assistance or oversight in completing UDS reports, to ensure that they are prepared accurately and delivered on time</li> <li>• Demonstrate Basic behaviors</li> </ul>
<b>2 - Basic</b>	<ul style="list-style-type: none"> <li>• Understand basic UDS reporting</li> </ul>
<b>1 - Learning</b>	<ul style="list-style-type: none"> <li>• Aware of UDS reporting requirements, but do not know how to complete them</li> </ul>

**A6. Demonstrate knowledge of the current health care environment,  
including all relevant regulations**

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

## **B. Systems Orientation**

The CEO needs to maintain both productive external relationships and partnerships, and an internal environment in which staff and board work together to successfully address the organization's Strategic Plan. The CEO must employ both "big picture" and "detailed systems" thinking in making organizational decisions based in the center's mission/vision/values.

## **B1. Utilize both “big picture” and detailed “system thinking” when analyzing issues and making decisions**

<b>Level</b>	<b>Examples</b>
<b>5 - Expert</b>	<ul style="list-style-type: none"> <li>• Anticipate the impact of decisions on the long-term strategy of the health center</li> <li>• Develop new tools or templates for evaluating alternative options</li> <li>• Create new methods for identifying data and analyzing its accuracy and importance</li> <li>• Demonstrate Skilled behaviors</li> </ul>
<b>4 - Skilled</b>	<ul style="list-style-type: none"> <li>• Ask strategic “generative” questions that challenge traditional thinking, in order to understand issues and pose alternatives that create new opportunities</li> <li>• Coach others on how to assess situations to make the most informed decisions about which courses of action to pursue</li> <li>• Demonstrate Applied behaviors</li> </ul>
<b>3 - Applied</b>	<ul style="list-style-type: none"> <li>• Identify information needed to make informed decisions about the strategic implications of specific courses of action</li> <li>• Fully consider potential courses of action and how they may affect the tactical operations of the health center</li> <li>• Consistently gather information from all stakeholders before making decisions</li> <li>• Use proven tools to evaluate alternatives in light of stakeholder requirements</li> <li>• Demonstrate Basic behaviors</li> </ul>
<b>2 - Basic</b>	<ul style="list-style-type: none"> <li>• Can describe “strategic” vs. “tactical” thinking</li> <li>• Understand the skills needed to make decisions effectively</li> </ul>
<b>1 - Learning</b>	<ul style="list-style-type: none"> <li>• Aware of the need to understand strategic consequences of decisions, but do not have practical experience regarding their impact</li> <li>• Recognize the complex nature of decision making</li> </ul>



**B2. Work collaboratively with staff and Board to generate, implement, and maintain a Strategic Plan based in consensus Mission/Vision/Values and including related and aligned goals/objectives**

Level	Examples
<b>5 - Expert</b>	<ul style="list-style-type: none"> <li>• Lead the Board and staff in leveraging the Strategic Plan to optimize and expanding the reach and breadth of the center, and continually improve its services</li> <li>• Lead the staff in continually aligning and (as needed) realigning annual objectives with the center’s strategic goals</li> <li>• Demonstrate Skilled behaviors</li> </ul>
<b>4 - Skilled</b>	<ul style="list-style-type: none"> <li>• Ensure that the Strategic Plan is actively referenced as routine administrative and clinical decisions are made</li> <li>• Coach Board and staff members on continued implementation, and revision as needed, of the Plan</li> <li>• Demonstrate Applied behaviors</li> </ul>
<b>3 - Applied</b>	<ul style="list-style-type: none"> <li>• Work with Board and staff to develop, implement, and maintain an actionable Strategic Plan based in consensus Mission, Vision, and Values</li> <li>• Annually set and communicate specific, measurable objectives that align with the Strategic Plan’s long-term goals based in the center’s Mission, Vision, and Values</li> <li>• Ensure that all stakeholders know how their work contributes to the Mission and to fulfillment of the ongoing Strategic Plan</li> <li>• Demonstrate Basic behaviors</li> </ul>
<b>2 - Basic</b>	<ul style="list-style-type: none"> <li>• Know the structure and recognized components of a Strategic Plan</li> <li>• Understand the relationships among organizational Mission, Vision, Values, goals, and objectives, and how these help drive the Strategic Plan.</li> <li>• Understand how Strategic Plan components relate to the health center and its environment</li> </ul>
<b>1 - Learning</b>	<ul style="list-style-type: none"> <li>• Aware of Strategic Plans and the organizational need for them</li> <li>• Aware of the need for an organization to have a clear Mission and Vision based in foundational Values</li> <li>• Know the need to set measurable goals and objectives, but lack experience in aligning these with a long-term organizational vision</li> </ul>

### **C. Cultural Sensitivity**

**The CEO ensures an environment in which cultural diversity, equity, and inclusion are givens, and in which sensitivity to differing cultures, behaviors, and wellness perspectives is the norm.**

**C1. Facilitate positive, constructive interactions among staff, patients, families, and the community by demonstrating sensitivity to differing cultures, behaviors, and wellness perspectives**

Level	Examples
<b>5 - Expert</b>	<ul style="list-style-type: none"> <li>• Lead development of new programs that successfully address health disparities among diverse populations served</li> <li>• Lead creation of appropriate materials that accommodate varying literacy levels of patients and family members</li> <li>• Create culturally-sensitive collaborative relationships/programs with internal and external stakeholders</li> <li>• Demonstrate Skilled behaviors</li> </ul>
<b>4 - Skilled</b>	<ul style="list-style-type: none"> <li>• Positively facilitate staff diversity in all health center roles and functional areas</li> <li>• Effectively manage conflict arising from cultural issues</li> <li>• Continuously earn respect from providers, other health center staff, patients, families, and community members</li> <li>• Lead through application of Emotional Intelligence theory</li> <li>• Demonstrate Applied behaviors</li> </ul>
<b>3 - Applied</b>	<ul style="list-style-type: none"> <li>• Continually assess perceptions of the health center from patients, families, and the community</li> <li>• Demonstrate “active listening” with all stakeholders</li> <li>• Establish ongoing personal rapport with stakeholders from diverse cultural and ethnic backgrounds</li> <li>• Ensure that all staff members continually view patients and families as integral members of the health center team</li> <li>• Adapt health center services as needed to languages, cultures, and preferences of patients and families</li> <li>• Identify appropriate written materials consistent with the languages and communication styles of patients, families, and community members</li> <li>• Communicate verbally with patients, families, and community members in their preferred language and communication mode, either directly or through an interpreter</li> <li>• Model open communication and desirability of “win-win” solutions</li> <li>• Demonstrate Basic behaviors</li> </ul>
<b>2 - Basic</b>	<ul style="list-style-type: none"> <li>• Understand own values relating to cultural, ethnic, and other differences</li> <li>• Understand basic communication theory, including fundamentals of semantics</li> </ul>

Level	Examples
	<ul style="list-style-type: none"> <li>• Know how to treat staff, patients, family members, and community representatives with honesty, dignity, and respect</li> </ul>
<b>1 - Learning</b>	<ul style="list-style-type: none"> <li>• Know the need for positive and constructive interactions with all stakeholders based in true cultural sensitivity (re: diverse cultures, differing cultural norms, and ethnic differences)</li> </ul>

**C2. Successfully advocate for genuine diversity and appropriate inclusion within the health center Board, staff, center-related community groups, and vendors**

Level	Examples
<b>5 - Expert</b>	<ul style="list-style-type: none"> <li>• Act on behalf of the health center as champion for diversity and inclusion in all internal/external transactions and collaborations</li> <li>• Create diversity policies that serve as guidelines for other health centers to follow</li> <li>• Demonstrate Skilled behaviors</li> </ul>
<b>4 - Skilled</b>	<ul style="list-style-type: none"> <li>• Serve as a mentor for Board and staff in identifying creative ways to fully evaluate the center's performance RE: diversity and inclusion</li> <li>• Coach Board and staff in continually improving the center's record of diversity and inclusion</li> <li>• Demonstrate Applied behaviors</li> </ul>
<b>3 - Applied</b>	<ul style="list-style-type: none"> <li>• Lead Board and staff in creating and implementing policies and procedures to enable true diversity and inclusion in the center</li> <li>• During vendor selection, ensure appropriate consideration of women-owned and minority-owned businesses</li> <li>• Demonstrate Basic behaviors</li> </ul>
<b>2 - Basic</b>	<ul style="list-style-type: none"> <li>• Know fundamental issues and dynamics relating to diversity and inclusion</li> <li>• Understand how these issues/dynamics play out in a real-world setting</li> </ul>
<b>1 - Learning</b>	<ul style="list-style-type: none"> <li>• Aware of the importance of, and need for, true diversity and inclusion in a health center setting, but unclear how to implement this</li> </ul>

## **D. Personnel Management & Teamwork**

CEOs must ensure that recruiting, onboarding, retention, general personnel management, and human resources compliance are successfully carried out. They must foster genuine teamwork and a sense of common purpose among all staff, through delegation, decision-making, clear job descriptions, and team collaboration which ensures that tasks are completed efficiently and with respect for all. The CEO works in partnership with Human Resources to ensure effective staff engagement and development that fosters optimal professional opportunities for future leaders.

## **D1. Foster a sense of genuine teamwork and common purpose among all health center staff**

<b>Level</b>	<b>Examples</b>
<b>5 - Expert</b>	<ul style="list-style-type: none"> <li>• Search for and implement best practices for creating a team-oriented environment</li> <li>• Anticipate and prepare for possible discord using scenario planning</li> <li>• Demonstrate Skilled behaviors</li> </ul>
<b>4 - Skilled</b>	<ul style="list-style-type: none"> <li>• Effectively direct collaboration and effective service delivery by the health center team (internal and external)</li> <li>• Create organizational understanding of, and appreciation for, all team member roles, including all disciplines (thereby minimizing organizational silos)</li> <li>• Develop a cadence for scheduling formal one-on-ones with team members to discuss projects, challenges, and resolutions</li> <li>• Demonstrate Applied behaviors</li> </ul>
<b>3 - Applied</b>	<ul style="list-style-type: none"> <li>• Create an environment in which innovation is valued and rewarded</li> <li>• Communicate regularly with the health center team, especially senior and executive (C-suite) staff, resulting in a common sense of genuine teamwork</li> <li>• Guide shared decision-making with stakeholders, sharing all relevant information as legally permitted</li> <li>• Proactively identify informal ways to meet and discuss relevant issues with specific team members</li> <li>• Determine how best to share information with others in the group</li> <li>• Participate actively in team meetings</li> <li>• Successfully foster joy in work among team members</li> <li>• Demonstrate Basic behaviors</li> </ul>
<b>2 - Basic</b>	<ul style="list-style-type: none"> <li>• Understand common concepts for forming and maintaining a true interdisciplinary health center team</li> </ul>
<b>1 - Learning</b>	<ul style="list-style-type: none"> <li>• Aware of the importance of effective teamwork, and of supporting all members of the health center team as needed</li> </ul>

## D2. Ensure achievement of effective personnel management functions

Level	Examples
<b>5 - Expert</b>	<ul style="list-style-type: none"> <li>• Craft a comprehensive staffing plan for the health center, to meet ongoing objectives</li> <li>• Develop innovative retention approaches, to create a rewarding and fulfilling work environment</li> <li>• Leverage the culture of life-long learning to guide the organization toward becoming either a Teaching Health Center (per the Affordable Care Act of 2010), or a training site for residents, other health care professions students, etc.</li> <li>• Create a structured template and related questions for conducting interviews for key health center positions</li> <li>• Demonstrate Skilled behaviors</li> </ul>
<b>4 - Skilled</b>	<ul style="list-style-type: none"> <li>• Guide others in conducting performance reviews, as well as recruiting, developing and retaining the best employees</li> <li>• Conduct real-time coaching and mentoring in a timely, honest, and respectful fashion</li> <li>• Develop effective succession planning</li> <li>• Use structured templates and related questions for conducting interviews for key health center positions</li> <li>• Demonstrate Applied behaviors</li> </ul>
<b>3 - Applied</b>	<ul style="list-style-type: none"> <li>• Use a variety of methods to attract qualified talent               <ul style="list-style-type: none"> <li>○ LinkedIn/social media</li> <li>○ Employee/manager referrals</li> <li>○ Professional societies/associations</li> <li>○ Community outreach</li> </ul> </li> <li>• Execute successful recruiting strategies, hiring not only for job skill, but also on the basis of commitment to the health center mission</li> <li>• Ensure a successful Onboarding &amp; Orientation program</li> <li>• Execute successful retention strategies</li> <li>• Provide routine job feedback in a timely, candid, and respectful manner</li> <li>• Conduct formal performance reviews and, as needed, progressive correction</li> <li>• Recognize and celebrate excellence</li> <li>• Ensure implementation of successful general and performance-based compensation programs</li> <li>• Cultivate a culture of life-long learning throughout the staff</li> </ul>



Level	Examples
	<ul style="list-style-type: none"> <li>• Ensure implementation of a successful benefits administration program</li> <li>• Demonstrate Basic behaviors</li> </ul>
<b>2 - Basic</b>	<ul style="list-style-type: none"> <li>• Understand personnel management fundamentals (managing direct reports, performance evaluation, progressive correction, etc.)</li> </ul>
<b>1 - Learning</b>	<ul style="list-style-type: none"> <li>• Aware of the responsibilities for effective personnel management in a health center, but have no or limited experience in managing others</li> </ul>

**D3. Working with other C-Suite health center officials as appropriate, ensure development and implementation of a successful provider recruitment/retention program**

Level	Examples
<b>5 - Expert</b>	<ul style="list-style-type: none"> <li>• Work with senior managers (especially the CMO and CDO) to create new and innovative ways to optimize recruiting/hiring, onboarding, and retention of effective providers, to include innovative compensation programs incorporating:               <ul style="list-style-type: none"> <li>○ Risk based contracting</li> <li>○ Care and case management incentives</li> <li>○ Shared savings</li> <li>○ Capitation</li> </ul> </li> <li>• Demonstrate Skilled behaviors</li> </ul>
<b>4 - Skilled</b>	<ul style="list-style-type: none"> <li>• Work with senior managers (especially the CMO and CDO) to investigate alternative provider performance compensation programs addressing productivity, quality, and other organizational priorities, to improve recruitment/retention and strengthen the center's financial stability</li> <li>• Coach others on how to develop and implement a successful provider recruitment/retention program</li> <li>• Demonstrate Applied behaviors</li> </ul>
<b>3 - Applied</b>	<ul style="list-style-type: none"> <li>• Working with senior managers (especially the CMO and CDO), ensure effective provider recruitment and retention programs, to include effective hiring mechanisms, onboarding systems, and compensation models</li> <li>• Work with provider staff to ensure their input to, and understanding of, all provider recruitment/retention programs at the center</li> <li>• Demonstrate Basic behaviors</li> </ul>
<b>2 - Basic</b>	<ul style="list-style-type: none"> <li>• Understand fundamental provider recruitment/retention issues, including recruiting/hiring, onboarding, and appropriate compensation (with attention to avoiding compensation inequity among providers)</li> </ul>
<b>1 - Learning</b>	<ul style="list-style-type: none"> <li>• Aware of the need for effective provider recruitment and retention strategies, including appropriate compensation models</li> </ul>

## D4. Ensure successful provider credentialing & privileging

Level	Examples
<b>5 - Expert</b>	<ul style="list-style-type: none"> <li>• Submit new ideas to credentialing bodies for streamlining the credentialing processes</li> <li>• Create innovative methods to ensure that credentialing &amp; privileging are appropriately tied to revenue cycle optimization</li> <li>• Demonstrate Skilled behaviors</li> </ul>
<b>4 - Skilled</b>	<ul style="list-style-type: none"> <li>• Guide ongoing improvements to the health center's program for credentialing/privileging</li> <li>• Coach others on how to manage the credentialing process</li> <li>• Demonstrate Applied behaviors</li> </ul>
<b>3 - Applied</b>	<ul style="list-style-type: none"> <li>• With the CMO, manage the overall credentialing process for the center</li> <li>• With the CMO, assess and confirm the qualifications of individual clinicians to provide services for the health center</li> <li>• With the CMO, determine the capabilities of practitioners to address the specific scope of services needed by the center</li> <li>• Interact with the Board regarding credentialing and approval of privileges</li> <li>• Ensure that privileges are granted in a timely manner</li> <li>• With the CMO, monitor the performance of individual clinicians to ensure that privileges should be maintained</li> <li>• Make appropriate recommendations to the Board regarding specific individuals (e.g., potentially impaired providers)</li> <li>• Demonstrate Basic behaviors</li> </ul>
<b>2 - Basic</b>	<ul style="list-style-type: none"> <li>• Understand both general principles of credentialing/privileging, and related HRSA requirements</li> <li>• Can describe the various elements of credentialing/privileging processes and how they apply to the health center</li> </ul>
<b>1 - Learning</b>	<ul style="list-style-type: none"> <li>• Aware of the importance of credentialing and privileging to managing overall risk in the health center</li> </ul>

## **E. Operational Management**

The CEO must work in partnership with other health center operational leaders and managers to ensure full alignment of people, processes, and places, supporting appropriate operational and clinical responses to a changing environment.

**E1. Ensure development and implementation of effective/efficient operational systems in all functional areas of the health center, both clinical and administrative**

Level	Examples
<b>5 - Expert</b>	<ul style="list-style-type: none"> <li>• Create systems, processes, and tools that ensure consistent delivery of high quality care and administrative support services</li> <li>• Create new and innovative approaches to time and project management that positively impact health center costs</li> <li>• Recognized by others as an expert in operational management; sought out to provide guidance</li> <li>• Anticipate issues related to regulatory changes that may impact health center systems or processes</li> <li>• Demonstrate Skilled behaviors</li> </ul>
<b>4 - Skilled</b>	<ul style="list-style-type: none"> <li>• Leverage tools, processes, and systems created by other health center leaders that ensures consistent delivery of high quality care and administrative support services</li> <li>• Take a collaborative leadership role within the health center regarding organizational planning and coordination</li> <li>• Apply effective change management techniques when modification of systems and/or processes is required</li> <li>• Demonstrate Applied behaviors</li> </ul>
<b>3 - Applied</b>	<ul style="list-style-type: none"> <li>• Ensure systems and related processes provide optimal access to health center services and generate high quality clinical outcomes</li> <li>• Ensure consistent operational processes               <ul style="list-style-type: none"> <li>○ Workflow management</li> <li>○ Productivity optimization</li> </ul> </li> <li>• Utilize structured project management techniques to plan, coordinate, and execute necessary functions</li> <li>• Assign responsibilities appropriately, to ensure coordination of functions</li> <li>• Ensure effective managerial development</li> <li>• Prepare/lead staff meetings using recognized meeting management techniques</li> <li>• Demonstrate Basic behaviors</li> </ul>
<b>2 - Basic</b>	<ul style="list-style-type: none"> <li>• Understand systems and processes that support consistent clinical and administrative operations, including fundamentals of time/project management</li> </ul>

Level	Examples
	<ul style="list-style-type: none"> <li>• Understand fundamental health care access issues and related scheduling concepts</li> <li>• Understand concepts and issues related to care planning/management/coordination</li> <li>• Understand basics of the health center’s practice management system, and utilize reports generated by that system</li> </ul>
<b>1 - Learning</b>	<ul style="list-style-type: none"> <li>• Aware of the need to have efficient and effective operational systems/processes in place, but minimal experience implementing and maintaining them</li> <li>• Have limited training or experience with formalized time/project management techniques</li> </ul>

**E2. Ensure that overall health center operations are consistent with generally-accepted business practices**

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

### **E3. Ensure that clinical and administrative operations are continuously aligned**

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



## **F. Finance & Reimbursement**

CEOs must fully understand budgets, cash flow analyses, income statements, and balance sheets. They also need to understand 990 tax returns, federal grant regulations, 340B regulations, audits, and compliance principles. The CEO works in partnership with the CFO in creating, and ensuring adherence to, appropriate financial policies and controls.

An important financial component is ongoing fund development for organizational sustainability. The CEO must ensure continual and diverse revenue streams (grants, fundraising events, major donor/foundation contributions, etc.) by creating conditions that enable fund development success. The CEO cannot wholly delegate these activities as potential donors and the community will want to interact personally with the CEO.

**F1. Able to use generally accepted financial tools and systems to analyze ongoing data and ensure effective financial management of the center**

Level	Examples
<b>5 - Expert</b>	<ul style="list-style-type: none"> <li>• Create innovative approaches to budgeting that enhance funding source opportunities</li> <li>• Demonstrate Skilled behaviors</li> </ul>
<b>4 - Skilled</b>	<ul style="list-style-type: none"> <li>• Use advanced tools such as practice management systems, dashboards, etc. to optimize operations and generate financial opportunities</li> <li>• Work with managers to optimize the overall health center budget</li> <li>• Coach others on how to analyze and leverage the data in health center financial statements</li> <li>• Demonstrate Applied behaviors</li> </ul>
<b>3 - Applied</b>	<ul style="list-style-type: none"> <li>• Use budgeting tools to help generate, track, and maintain annual health center budgets</li> <li>• Utilize financial statement analysis to drive decisions about clinical and administrative operations</li> <li>• Actively participate in decisions regarding overall health center finances and budget development</li> <li>• Demonstrate Basic behaviors</li> </ul>
<b>2 - Basic</b>	<ul style="list-style-type: none"> <li>• Understand essential financial concepts and reporting tools               <ul style="list-style-type: none"> <li>○ Income statement</li> <li>○ Balance sheet</li> <li>○ Financial ratios</li> </ul> </li> <li>• Understand budgeting principles and requirements of major health center funding sources</li> </ul>
<b>1 - Learning</b>	<ul style="list-style-type: none"> <li>• Aware of the purpose of financial statements and ratios, but not well-versed in their details</li> </ul>

## F2. Ensure awareness by all staff of critical reimbursement mechanisms and issues

Level	Examples
<b>5 - Expert</b>	<ul style="list-style-type: none"> <li>• Work with senior managers in creating new and innovative approaches to leveraging reimbursement mechanisms available to the health center</li> <li>• Demonstrate Skilled behaviors</li> </ul>
<b>4 - Skilled</b>	<ul style="list-style-type: none"> <li>• Act as a resource to health center managers on reimbursement issues</li> <li>• Demonstrate Applied behaviors</li> </ul>
<b>3 - Applied</b>	<ul style="list-style-type: none"> <li>• Work with members of the senior management team to communicate to staff the various reimbursement mechanisms important to the center</li> <li>• Work with staff to ensure that they understand their role in maximizing health center reimbursement</li> <li>• Demonstrate Basic behaviors</li> </ul>
<b>2 - Basic</b>	<ul style="list-style-type: none"> <li>• Understand reimbursement options/issues for health centers               <ul style="list-style-type: none"> <li>○ Risk based mechanisms</li> <li>○ Public and private payers</li> </ul> </li> </ul>
<b>1 - Learning</b>	<ul style="list-style-type: none"> <li>• Have general awareness of reimbursement issues and mechanisms at the health center level, including Prospective Payment</li> </ul>

**F3. Ensure timely and successful completion of health center grant applications (i.e., Section 330 and other public grants), and related reporting**

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

**F4. Identify and cultivate potential private health center donors  
(individual/corporate/foundations)**

Level	Examples
<b>5 - Expert</b>	<ul style="list-style-type: none"> <li>• Secure private donations to ensure future health center operations</li> <li>• Demonstrate Skilled behaviors</li> </ul>
<b>4 - Skilled</b>	<ul style="list-style-type: none"> <li>• Secure private donations to enable expansion of current operations</li> <li>• Demonstrate Applied behaviors</li> </ul>
<b>3 - Applied</b>	<ul style="list-style-type: none"> <li>• Successfully secure private donations to augment public funds in enabling current operations</li> <li>• Demonstrate Basic behaviors</li> </ul>
<b>2 - Basic</b>	<ul style="list-style-type: none"> <li>• Understand fundamentals of private donor identification and cultivation</li> </ul>
<b>1 - Learning</b>	<ul style="list-style-type: none"> <li>• Aware of need to actively secure external private funding for health center operations</li> </ul>

**F5. Successfully lead the health center in investigation and decision-making RE: new organizational models and opportunities (mergers/acquisitions, ACOs, value-based payment models, new market tax credits, etc.)**

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

**F6. Ensure that the center takes optimal advantage of the federal 340B drug program**

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

## **G. Quality Management**

According to the Institute of Medicine, quality health services are “safe, effective, patient centered, timely, efficient, and equitable”. The CEO supports and participates in quality management and related programs, including accreditation and Patient Centered Medical Home (PCMH) recognition, which foster continual health center improvement.



**G1. Actively support and participate in a health center Quality Management program that uses proven quality techniques (measurement, PDSA cycles, benchmarking, etc.) to successfully foster continual improvement in operations and care delivery**

Level	Examples
<b>5 - Expert</b>	<ul style="list-style-type: none"> <li>• Create new tools and techniques to monitor and measure quality, and improve quality programs</li> <li>• Continually seek out new approaches that will have the greatest impact on outcomes</li> <li>• Demonstrate Skilled behaviors</li> </ul>
<b>4 - Skilled</b>	<ul style="list-style-type: none"> <li>• Coach center staff and Board in pursuit of the Quadruple Aim</li> <li>• Lead the health center’s Quality Management program</li> <li>• Perceived internally as always actively considering ways to improve and to optimize processes</li> <li>• Mentor staff regarding Quality Management concepts and techniques</li> <li>• Actively advocate for preventing “initiative overload” and QM fatigue</li> <li>• Demonstrate Applied behaviors</li> </ul>
<b>3 - Applied</b>	<ul style="list-style-type: none"> <li>• Ensure active ongoing use of the center’s formal QM Plan</li> <li>• Ensure a structured surveillance system for identifying process improvement and operational optimization</li> <li>• Use recognized quality tools and techniques to measure/monitor processes and outcomes and to improve clinical and administrative performance               <ul style="list-style-type: none"> <li>○ Peer review</li> <li>○ Benchmarking</li> </ul> </li> <li>• Can differentiate among alternative quality process improvement models (while understanding their underlying commonalities), and help select the most appropriate model for specific projects</li> <li>• Leverage best practice guidelines to identify and execute quality management initiatives</li> <li>• Demonstrate Basic behaviors</li> </ul>
<b>2 - Basic</b>	<ul style="list-style-type: none"> <li>• Understand both the national Quadruple Aim and the Chronic Care Model</li> <li>• Know the basics of a Quality Management (QM) Plan, and familiar with the health center’s own Plan</li> <li>• Understand traditional QM concepts</li> </ul>

Level	Examples
	<ul style="list-style-type: none"> <li>• Understand “initiative overload” and QM fatigue</li> <li>• Understand benchmarking</li> <li>• Understand performance metrics and related HRSA requirements</li> <li>• Pursue process improvement and optimization opportunities identified by others</li> </ul>
<b>1 - Learning</b>	<ul style="list-style-type: none"> <li>• Aware of the importance of quality-related programs in a health center setting</li> </ul>

## **G2. Support ongoing health center accreditation and Patient Centered Medical Home (PCMH) recognition**

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

## **H. Health Information Technology**

The CEO ensures (generally through oversight rather than direct engagement) appropriate use of EHRs, PMSs, and advanced HIT applications to optimize quality of care, center operations, and reimbursement.

## **H1. Ensure optimal use of EHRs, PMSs, and advanced HIT applications to optimize quality of care, health center operations, and reimbursement**

Level	Examples
<b>5 - Expert</b>	<ul style="list-style-type: none"> <li>• Create new and innovative approaches to leveraging technology to optimize management of clinical and administrative functions</li> <li>• Lead team in utilizing “big data” techniques to advance optimal care quality and true Population Health</li> <li>• Demonstrate Skilled behaviors</li> </ul>
<b>4 - Skilled</b>	<ul style="list-style-type: none"> <li>• Lead the clinical team in promoting and utilizing advanced electronic Health Information Technology               <ul style="list-style-type: none"> <li>○ Health Information Exchanges (HIEs)</li> <li>○ Data warehouses</li> </ul> </li> <li>• Lead team in optimizing use of EHRs and taking advantage of all related data-driven opportunities (analytics, etc.)</li> <li>• Demonstrate Applied behaviors</li> </ul>
<b>3 - Applied</b>	<ul style="list-style-type: none"> <li>• Ensure selection of appropriate HIT/EHR vendors based on specific organizational needs, including appropriate reporting</li> <li>• Ensure that the center's EHR system is effectively used to retrieve patient data as needed</li> <li>• Guide staff in successfully addressing operational issues regarding the health center's EHR system, including use of appropriate cybersecurity measures to continuously safeguard PHI</li> <li>• Guide staff in helping patients/families use online tools appropriately, as part of care plans (including provider/patient communication via secure technologies)</li> <li>• Drive efforts to leverage technology to improve care and management functions</li> <li>• Demonstrate Basic behaviors</li> </ul>
<b>2 - Basic</b>	<ul style="list-style-type: none"> <li>• Understand advanced technology concepts beyond EHRs (e.g., HIEs and data warehouses)</li> <li>• Know advantages of, and issues regarding, EHRs and their selection/implementation</li> <li>• Know fundamentals of cybersecurity measures to safeguard PHI</li> <li>• Know potential consumer applications enabling patients/families to access health and intervention information online</li> </ul>

Level	Examples
<b>1 - Learning</b>	<ul style="list-style-type: none"> <li>• Aware of the need for, and uses of, Electronic Health Records (EHRs) in a health center environment, including the need for ongoing safeguarding of Protected Health Information (PHI) through appropriate cybersecurity measures</li> <li>• Aware of Health Information Exchanges (HIEs) and data warehouses</li> </ul>

## **I. Legal & Ethical Issues**

**CEOs lead through personal integrity, respect for all, and clear commitment to excellence, and they ensure the same from all staff. A CEO must also ensure successful Risk Management awareness and action, as well as ongoing compliance with both the Federal Tort Claims Act and all grant requirements.**

## I1. Ensure that staff continually adopt successful Risk Management awareness and approaches

Level	Examples
<b>5 - Expert</b>	<ul style="list-style-type: none"> <li>• Contribute new ideas on mitigating risk associated with provision of health center services</li> <li>• Demonstrate Skilled behaviors</li> </ul>
<b>4 - Skilled</b>	<ul style="list-style-type: none"> <li>• Lead ongoing modifications/ improvements to the center's Risk Management Plan</li> <li>• Coach others on how to follow proper protocols with respect to critical components of the health center's Risk Management Plan</li> <li>• Demonstrate Applied behaviors</li> </ul>
<b>3 - Applied</b>	<ul style="list-style-type: none"> <li>• Ensure that health center staff know and successfully execute the center's Risk Management Plan consistently across all critical components:               <ul style="list-style-type: none"> <li>○ Quality Management</li> <li>○ Safety</li> <li>○ Clinical Management</li> <li>○ Credentialing and Privileging</li> <li>○ Patient Records</li> <li>○ Patient Communications</li> <li>○ Incident Reporting and Tracking</li> </ul> </li> <li>• Identify and appropriately work with available legal resources having deep knowledge of health centers</li> <li>• Demonstrate Basic behaviors</li> </ul>
<b>2 - Basic</b>	<ul style="list-style-type: none"> <li>• Understand Risk Management principles and HRSA's specific Risk Management requirements, and am familiar with own health center's Risk Management Plan</li> </ul>
<b>1 - Learning</b>	<ul style="list-style-type: none"> <li>• Aware of the importance of managing risk and avoiding malpractice lawsuits</li> </ul>



## **12. Ensure that the health center successfully takes full advantage of the Federal Tort Claims Act (FTCA) program**

<b>Level</b>	<b>Examples</b>
<b>5 - Expert</b>	<ul style="list-style-type: none"> <li>• Create new/streamlined procedures for identifying FTCA issues and how they impact the health center</li> <li>• Demonstrate Skilled behaviors</li> </ul>
<b>4 - Skilled</b>	<ul style="list-style-type: none"> <li>• Act immediately and appropriately regarding all issues relating to impaired providers</li> <li>• Continuously remain current on FTCA mandates/guidelines, and ensure understanding of and compliance with updated or modified regulations</li> <li>• Demonstrate Applied behaviors</li> </ul>
<b>3 - Applied</b>	<ul style="list-style-type: none"> <li>• Assist with FTCA deeming/re-deeming applications for the center</li> <li>• Ensure that all health center practitioners have appropriate credentials and privileges as required for FTCA coverage</li> <li>• Ensure that all Quality Improvement requirements are met per FTCA guidelines</li> <li>• Demonstrate Basic behaviors</li> </ul>
<b>2 - Basic</b>	<ul style="list-style-type: none"> <li>• Understand fundamental regulations and issues regarding the Federal Tort Claims Act and FTCA deeming</li> </ul>
<b>1 - Learning</b>	<ul style="list-style-type: none"> <li>• Aware of the Federally Supported Health Centers Assistance Act and Federal Tort Claims Act (FTCA), and how the impunity they provide limits risk and liability of the health center</li> </ul>

### **13. Demonstrate commitment to the highest standards of ethical responsibility**

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

## **14. Ensure compliance with all grant requirements and HRSA's compliance manual**

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

## **J. Advocacy**

**A CEO must develop and maintain strong relationships with professional peers, donors, industry association colleagues, media representatives, and more. Transparency and coalition building are critical, as is regular communication with direct stakeholders and the general public. The CEO will need to maintain awareness of all advocacy rules related to federal fund sources and must guide staff and board in taking an active role in community mobilization for health.**

**J1. Within legal limits, continuously advocate for the health center and its community role with appropriate external entities**

Level	Examples
<b>5 - Expert</b>	<ul style="list-style-type: none"> <li>• Create new approaches to advocating on behalf of the health center</li> <li>• Create and cultivate coalitions to support health center advocacy at local, state and/or national levels</li> <li>• Create and maintain a culture of advocacy at all levels of the organization</li> <li>• Demonstrate Skilled behaviors</li> </ul>
<b>4 - Skilled</b>	<ul style="list-style-type: none"> <li>• Actively build positive relationships with, and help guide advocacy efforts between/among, other health centers and public health agencies on behalf of the national Quadruple Aim</li> <li>• Coach others on how to advocate for the health center with all relevant stakeholders</li> <li>• Demonstrate Applied behaviors</li> </ul>
<b>3 - Applied</b>	<ul style="list-style-type: none"> <li>• Conduct legislative visits, as appropriate and allowed, with local, state, and federal policy makers to educate them on the role and importance of the health center (in coordination with PCA &amp; NACHC, as appropriate)</li> <li>• Help raise local awareness of the center as a vital community resource</li> <li>• Successfully guide advocacy efforts while maintaining the center’s legal non-profit status.</li> <li>• Guide outreach efforts to educate community residents about specific health center services</li> <li>• Demonstrate Basic behaviors</li> </ul>
<b>2 - Basic</b>	<ul style="list-style-type: none"> <li>• Understand the roles of state and federal policy-makers in enabling health center operations (both financially and from a regulatory perspective)</li> <li>• Know legal parameters on what is and is not allowable RE: use of grant funds and “other” fund sources for advocacy</li> </ul>
<b>1 - Learning</b>	<ul style="list-style-type: none"> <li>• Aware of the need to build relationships with stakeholders that help enable and foster community health center operations</li> </ul>

## **J2. Guide staff and Board in learning about, and taking an active role in, community mobilization for health**

<b>Level</b>	<b>Examples</b>
<b>5 - Expert</b>	<ul style="list-style-type: none"> <li>• Create new and innovative approaches for mobilizing health services for the community</li> <li>• Demonstrate Skilled behaviors</li> </ul>
<b>4 - Skilled</b>	<ul style="list-style-type: none"> <li>• Advocate for ongoing clinical excellence among all center sites and in collaboration with other health care organizations</li> <li>• Guide the center's participation as needed in emergency community response               <ul style="list-style-type: none"> <li>○ Designation as "essential personnel" in local emergency response plans</li> <li>○ Participation in table-top drills of local emergency response teams</li> </ul> </li> <li>• Demonstrate Applied behaviors</li> </ul>
<b>3 - Applied</b>	<ul style="list-style-type: none"> <li>• Lead all staff in understanding the health center "value equation" (improved care/reduced costs)</li> <li>• Lead community mobilization activities when appropriate</li> <li>• Demonstrate Basic behaviors</li> </ul>
<b>2 - Basic</b>	<ul style="list-style-type: none"> <li>• Understand the health center "value equation" (improved care/reduced costs)</li> </ul>
<b>1 - Learning</b>	<ul style="list-style-type: none"> <li>• Aware of the role of the health center in providing health care services to under-served populations in the community</li> </ul>

## **K. Resilience & Joy in Work**

**CEOs must successfully undertake and navigate change, and they must provide support to staff as the center addresses new initiatives and care models. In addition, CEOs must successfully promote true joy in work, both personally and for the health center staff, in part by leveraging Emotional Intelligence theory.**

**K1. Able to successfully navigate change as a leader, and to provide support for health center staff as the center adopts new initiatives and addresses new care models**

Level	Examples
<b>5 - Expert</b>	<ul style="list-style-type: none"> <li>• Seen as mentor, both internally and with related external parties, in effectively dealing with stressors resulting from environmental or organizational change</li> <li>• Create change management approaches that minimize the stress associated with constant change</li> <li>• Demonstrate Skilled behaviors</li> </ul>
<b>4 - Skilled</b>	<ul style="list-style-type: none"> <li>• Communicate genuine empathy to Board and staff RE: responses to significant change</li> <li>• Coach Board and staff members in successfully overcoming negative responses to significant change</li> <li>• Demonstrate Applied behaviors</li> </ul>
<b>3 - Applied</b>	<ul style="list-style-type: none"> <li>• Employ self-awareness and Change Management theory in positively managing own responses to significant health care and organizational change</li> <li>• Employ Change Management theory in positively managing Board/staff responses to significant changes in health care and the health center organization</li> <li>• Demonstrate Basic behaviors</li> </ul>
<b>2 - Basic</b>	<ul style="list-style-type: none"> <li>• Know Change Management theory</li> <li>• Understand responses to change by self and others</li> </ul>
<b>1 - Learning</b>	<ul style="list-style-type: none"> <li>• Have some awareness of responses to change by self and others</li> </ul>



## K2. Effectively promote joy in work, both personally and for the health center staff

Level	Examples
<b>5 - Expert</b>	<ul style="list-style-type: none"> <li>• Identify innovative ways to permanently minimize both personal/relational and organizational/technical causes and effects of lack of joy in work</li> <li>• Create a work environment that enables the fostering of joy in performing required work activities</li> <li>• Demonstrate Skilled behaviors</li> </ul>
<b>4 - Skilled</b>	<ul style="list-style-type: none"> <li>• Coach staff in ability to identify specific instances of lack of joy in work</li> <li>• Coach staff in ways to modify/minimize personal and relational causes and effects of lack of joy in work</li> <li>• Instruct staff on ways to modify/minimize organizational and technical causes and effects of lack of joy in work</li> <li>• Seen as mentor to staff and others in successful promotion of ongoing joy in work and resilience</li> <li>• Guide staff in knowing how to promote joy in work</li> <li>• Coach staff in stress tolerance and resilience skills</li> <li>• Demonstrate Applied behaviors</li> </ul>
<b>3 - Applied</b>	<ul style="list-style-type: none"> <li>• Able to identify symptoms of lack of joy in work, and lack of resilience, in both self and staff</li> <li>• Can successfully intervene in instances of lack of joy in work</li> <li>• Guide staff in learning specifics of personal/relational causes and effects of lack of joy in work</li> <li>• Guide staff in learning specifics of organizational/technical causes and effects of lack joy in work</li> <li>• Demonstrate Basic behaviors</li> </ul>
<b>2 - Basic</b>	<ul style="list-style-type: none"> <li>• Understand fundamental principles of stress tolerance and resilience</li> <li>• Know personal/relational causes and effects of lack of joy in work</li> <li>• Know organizational/technical causes and effects of lack of joy in work</li> </ul>
<b>1 - Learning</b>	<ul style="list-style-type: none"> <li>• Aware that lack of joy in work is a potentially serious organizational problem, but not knowledgeable about its causes, effects, or how to prevent/address it</li> </ul>

### **K3. Demonstrate ability to leverage Emotional Intelligence theory for the benefit of self and health center staff**

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

## L. Leadership

“Leadership” encompasses all other Domains. As the public face of the health center, the CEO is seen by all stakeholders as the visible embodiment of the entity. The CEO must articulate the mission/vision/values, change principles, needs, and overarching strategy of the organization. CEOs also foster positive board partnership, accountability, and a sense of complementary roles with interlocking responsibilities. Finally, CEOs have ultimate responsibility for their centers, but they are not responsible for doing all tasks; rather, they delegate appropriately.

## **L1. Create and model a positive, collaborative, and fear-free organizational culture**

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

## **L2. As Board-supervised authorizing official for the center, exercise positive stewardship with all stakeholders**

<b>Level</b>	<b>Examples</b>
<b>5 - Expert</b>	<ul style="list-style-type: none"> <li>• Find innovative ways to continuously enhance CEO and center relationships with all major stakeholders</li> <li>• Demonstrate Skilled behaviors</li> </ul>
<b>4 - Skilled</b>	<ul style="list-style-type: none"> <li>• Keep all stakeholders informed of activities impacting them, and of the strong relationships of the center and the CEO with other stakeholders</li> <li>• Coach Board and staff on how to continuously foster strong, positive relationships with one another and with external stakeholders</li> <li>• Demonstrate Applied behaviors</li> </ul>
<b>3 - Applied</b>	<ul style="list-style-type: none"> <li>• Successfully develop and continuously maintain strong and positive relationships with all major internal and external stakeholders</li> <li>• Execute tasks generally required of the authorized business official for the center               <ul style="list-style-type: none"> <li>○ Signatory for internal and external documents</li> <li>○ Community “face” of the organization</li> <li>○ Designated center negotiator</li> <li>○ Point of contact for internal and external stakeholders</li> </ul> </li> <li>• Demonstrate Basic behaviors</li> </ul>
<b>2 - Basic</b>	<ul style="list-style-type: none"> <li>• Fully understand methods and techniques for creating/maintaining mutually-supportive relationships with all major stakeholders</li> </ul>
<b>1 - Learning</b>	<ul style="list-style-type: none"> <li>• Know the need for strong relationships with internal and external parties at multiple levels, but unsure how to accomplish this</li> </ul>

### **L3. Motivate staff and Board to adopt and pursue a transformational mindset**

<b>Level</b>	<b>Examples</b>
<b>5 - Expert</b>	<ul style="list-style-type: none"> <li>Continuously pursue opportunities for “creative disruption”, for the long-term benefit of the center and its patients</li> <li>Demonstrate Skilled behaviors</li> </ul>
<b>4 - Skilled</b>	<ul style="list-style-type: none"> <li>Motivate Board and staff to sustain successful organizational change</li> <li>Guide Board and staff in maintaining positive changes and their results</li> <li>Demonstrate Applied behaviors</li> </ul>
<b>3 - Applied</b>	<ul style="list-style-type: none"> <li>Lead health center successfully through needed transformational change</li> <li>Demonstrate Basic behaviors</li> </ul>
<b>2 - Basic</b>	<ul style="list-style-type: none"> <li>Know issues and dynamics involved in successful organizational transformation</li> <li>Understand organizational transformation theory</li> </ul>
<b>1 - Learning</b>	<ul style="list-style-type: none"> <li>Aware of the need for organizational transformation in the current health care environment</li> </ul>

#### **L4. Generate mutually beneficial partnerships and collaborations with other entities sharing common organizational objectives**

<b>Level</b>	<b>Examples</b>
<b>5 - Expert</b>	<ul style="list-style-type: none"> <li>Continuously seek out new and innovative organizational arrangements that will benefit the center and partnering/collaborating organizations</li> <li>Demonstrate Skilled behaviors</li> </ul>
<b>4 - Skilled</b>	<ul style="list-style-type: none"> <li>Instruct Board and staff in the need to pursue beneficial partnerships/collaborations with other organizations having common interests</li> <li>Mentor Board and staff on how best to facilitate beneficial partnerships/collaborations</li> <li>Demonstrate Applied behaviors</li> </ul>
<b>3 - Applied</b>	<ul style="list-style-type: none"> <li>Lead the center in creating and successfully implementing new partnerships/collaborations for the benefit of all involved organizations</li> <li>Actively and successfully sustain existing partnerships/collaborations</li> <li>Demonstrate Basic behaviors</li> </ul>
<b>2 - Basic</b>	<ul style="list-style-type: none"> <li>Understand how to maintain existing beneficial partnerships/collaborations</li> <li>Know how to create new beneficial partnerships/collaborations</li> </ul>
<b>1 - Learning</b>	<ul style="list-style-type: none"> <li>Aware of the need for, and benefits of, ongoing partnerships and collaborations</li> </ul>

**L5. Constantly demonstrate unconditional respect for all staff, Board members, patients, families, and community residents**

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



**L6. Inspire and motivate all Board and staff members – regardless of background or demographics – to pursue ongoing excellence in furtherance of the center’s mission**

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

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