



Request for Proposal (RFP)

Health Center C-Suite Shared Core Competencies Learning Program

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Proposals Due: December 28, 2025

Points of Contact

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Organization Overview

The [National Association of Community Health Centers](https://www.nachc.org/) (NACHC) is a national organization that supports federally qualified health centers and federally qualified health center look-alike organizations (also known as FQHCs or Community Health Centers), expanding healthcare services for the medically underserved and uninsured. Founded in 1971 to promote efficient, high-quality, comprehensive healthcare that is accessible, community-directed, and patient-centered for all, NACHC's mission and strategic framework continue to guide our values and priorities as an organization representing the national health center movement.

Background

NACHC developed the 48 Shared Competencies (included below) to establish a consistent, evidence-based foundation of leadership skills, knowledge, and behaviors for all FQHC executive roles. This framework strengthens cross-functional leadership and promotes alignment across the C-suite, emphasizing core values such as integrity, communication, strategic thinking, and effective team leadership.

As NACHC expands its national leadership development efforts, there is a need to validate and prioritize the competencies, develop an aligned assessment tool, and map existing training and technical assistance resources to identify resource gaps. This RFP seeks a qualified vendor to complete this work and ensure the Shared Core Competencies remain relevant, actionable, and fully supported by the tools and resources required for effective C-suite/executive leadership development across the health center landscape.

Time Period

The period for services is **January 26, 2026 through June 30, 2026**. Vendor(s) may be retained for a multi-year period of service, based upon successful performance during the period of initial service (contract year ending June 30, 2026) and ongoing availability of funds.

Budget Information

A budget of up to \$50,000 is estimated for this project. The selected vendor(s) must provide a comprehensive budget based on the ideal methodology and process used to meet the desired services, scope of work, and deliverables. All costs must be itemized into the appropriate budget categories and must directly relate to the project activities described in the RFP. Up to two budget proposals at various budget levels may be submitted. Vendors are encouraged to provide options within the following budget ranges: up to -\$25,000, and \$25,000-\$50,000. Budget negotiations may occur.

RFP Services Desired

NACHC seeks a vendor to develop a validated, prioritized, and assessment-ready competency model and supporting tools to serve as the foundation for NACHC's national C-suite leadership development strategy. Vendors must also demonstrate expertise in:

- instructional design and competency framework development, including mapping training and technical assistance resources to competencies
- project management and structured facilitation
- qualitative research synthesis (survey/focus group analysis)
- assessment content development
- basic user experience/prototyping for non-automated assessment tools
- professional writing and editing

Scope of Work and Deliverables

The vendor will support NACHC in advancing the C-Suite Shared Competencies Framework through a three-phase project:

1. validating and revising the competencies prioritizing key competencies,
2. developing an aligned assessment tool, and
3. conducting resource mapping and gap analysis.

These activities will ensure a consistent, evidence-based foundation for C-suite leadership development and subsequent training and technical assistance.

NACHC has also defined learner levels to clarify how proficiency and mastery are demonstrated within the framework.

Learner Levels (1–5)

- Level 1 – Novice: Performance at the novice level may demonstrate “book” knowledge of many skills, but with relatively little experiential knowledge.

- Level 2 – Advanced Beginner: Performance at the Advanced Beginner level demonstrates experience in some situations. Experience is at the initial stages of fully understanding the various complexities of those situations.
- Level 3 – Competent: Performance at the Competent level shows enough experience to independently complete most tasks and grasp multiple aspects of complex situations but also may feel overwhelmed at times.
- Level 4 – Proficient; Performance at the Proficient level demonstrates a significant amount of experience. Situations are approached holistically and intuitively, while navigating the interdependence and priority of various aspects of the situation.
- Level 5 – Expert; Performance at the Expert level demonstrates an enormous experiential background with rapid assessment and response to situations by efficiently zeroing in on and implementing the best courses of action.

Three-Phase Project Structure

Phase 1: Validation & Prioritization [Estimated timeframe: February-March]

- Conduct a structured field review of the Shared Competencies Toolkit.
- Launch and analyze a Top 10 prioritization activity.
- Facilitate Subject Matter Experts (SMEs) and field leader validation sessions for the prioritized competencies.
- Synthesize prioritization themes
- Confirm learner levels within each prioritized competency (Levels 1–5).
- Produce a vetted 48-competency framework and prioritize the Top 10 with updated formatting.

Deliverables: Field Review Report, Validation Data Summary, Prioritized Top 10 List, Learner-Level Identification, Updated Shared Competency Toolkit

Note: Identification of field executives, SMEs and related leaders will occur in close coordination with NACHC project leads

Phase 2: Assessment Tool Development & User Testing [Estimated timeframe: April-May]

- Develop a non-automated assessment tool for the shared core competencies, aligned with Learner Levels 1–5, for the top 10 prioritized competencies. Selected vendors will have access to existing NACHC assessment tools currently utilized for C-Suite roles.
- Conduct user testing with 8–12 health center C-Suite leaders and NACHC SMEs.
- Refine the tool based on feedback.

Deliverables: Assessment Tool Prototype, Scoring Guide, Pilot Test Summary, Revised Assessment Tool

Phase 3: Resource Mapping & Gap Analysis [Estimated timeframe: May-June]

- Inventory and map NACHC’s existing training and technical assistance resources in the prioritized core competency areas by learner levels 1-5.
- Identify gaps in training and technical assistance resources needed for the prioritized core competency areas. This may include identifying where refinement of existing resources or development of new resources may be needed in the future.
- Produce recommendations for future development or enhancement of the Health Center C-Suite Core Competencies Learning Program.

Deliverables: Resource Alignment Matrix, Gap Analysis Report, Final Shared Competency Toolkit (for the focused Top 10 competencies), Final Recommendations Report.

Information Requested

Proposals must be submitted using NACHC's web-based portal by **December 28, 2025 11:59EST**.

Incomplete proposals will not be considered. NACHC will notify all applicants on or around **January 21, 2026**.

Online Submission Portal:

C-Suite Shared Core Competencies Learning Program

[Application Submission](#)

Proposals must contain the items below, which are evaluated based on the specific criteria outlined in the Evaluation table below.

- Point of Contact Information
- Name / Description of Organization
- Evidence of Work & References
- Project Workplan & Timeline
- Proposed Budget Rates and Budget Narrative
- Capability Statement
- Resume(s)
- Signed Statement (see below)

Attestation

By my electronic signature, I certify that this Proposal reflects my best estimate of the organization's capability and the proper and necessary costs for the project, and the information provided herein is accurate, complete, and current as of the date of my signature below.

Evaluation Criteria

Complete proposals will be evaluated based on the criteria outlined below.

Rating Domain	Application Selection Criteria	Points
Evidence of Expertise & References	<p>Evidence of work must align with the project described in this RFP and demonstrate the ability to deliver technical skills as a subject matter expert (SME) within the specified content area. Evidence of work must include the following: Work samples required in this RFP include:</p> <ul style="list-style-type: none"> • A previously developed competency framework, assessment tool, resource mapping/gap analysis, or a brief case study demonstrating experience with leadership or workforce development initiatives. • Sample documents clearly illustrate the approach, methodology, and ability to produce high-quality, actionable deliverables. <p>Page Limit: 10 pages per sample</p> <p>References required in this RFP include the following:</p> <ul style="list-style-type: none"> • Past client evaluations, reference letters, and/or testimonials demonstrating quantitative and/or qualitative feedback from at least two clients' engagements occurring within the past two years of the RFP application date. <p>Page Limit: 5 pages</p>	25
Project Workplan & Timeline	<p>The vendor should provide a proposed workplan and fully explain their approach to developing a project work plan, such as their use of (not limited to) a process followed for project development, a schedule of activities that describes how the vendor will achieve the scope of work, measurement/evaluation, or other details that outline how the vendor approaches their project work.</p> <p>Page Limit: 10 pages</p>	25
Resume(s)	<p>Demonstrates education and work experience consistent with vendor requirements and scope of work deliverables outlined in the RFP.</p> <p>Page Limit: 5 pages</p>	20
Budget Narrative* and Daily/hourly Rate	<p>Reasonableness of the proposed budget for project implementation, inclusive of preparation and delivery to the client. NACHC's non-profit status determines reasonableness.</p> <ul style="list-style-type: none"> • Hourly Rate should reflect the overall cost rate inclusive of any fringe, overhead, and/or general & administrative expense (G&A), if required. Please ensure that costs are accurately delineated using the template categories. 	15
Capability Statement	<p>Provide a brief document highlighting your ability to deliver technical skills and/or subject matter expertise.</p> <p>Page Limit: 2 pages</p>	15
Total		100

Scoring Matrix

- a. NACHC’s review team will assign scores on a scale of zero (0) to five (5) where the end and midpoints are defined as follows:

Score	Description	Discussion
0	No Value	The Response does not address any component of the requirement, or no information was provided.
1-2	Below Average	The Response only minimally addresses the requirement and the vendors ability to comply with the requirement or simply has restated the requirement.
3	Average	The Response shows an acceptable understanding or experience with the requirement. Sufficient detail to be considered "as meeting minimum requirements."
4-5	Above Average	The Response is thorough and complete and demonstrates firm understanding of concepts and requirements.

- b. A score of zero (0) on any scored requirement may cause the entire application to be eliminated from further consideration.
- c. Application scores will be calculated by multiplying the average (mean) score assigned by the review committee members by the weight assigned to each scored element: Average Score x Weight = Points Awarded

Appendix A:

FQHC Leadership Shared Competencies

TOOLKIT

TABLE OF CONTENTS

3 **Methodology, Recommendations for Use, and Impact**

4 **Levels of Competency: Novice to Expert**

5 **Shared Competencies and the VTF**

7-55 **48 Shared Competencies for FQHC Leaders**

Acknowledgments

BACKGROUND

This set of 48 shared competencies was developed by the National Association of Community Health Centers and collaborators to establish a core foundation of leadership skills, knowledge, and behaviors that model success across all Federally Qualified Health Centers (FQHCs) C-Suite roles, including CEOs, COOs, CFOs, CMOs, and others. These competencies are designed to strengthen strategic, cross-functional leadership and alignment across executive roles responsible for advancing the health center mission.

METHODOLOGY

The competencies in this guide were cultivated from multiple sources and validated against the operational realities of today's health centers.

Each competency draws on essential skills, knowledge, and behaviors previously developed by NACHC and its partners for specific executive roles such as Chief Medical Officer, Chief Operating Officer, Chief Financial Officer, among other leadership roles in areas such as Informatics and Quality Improvement. The shared competencies have been streamlined, updated, and further aligned with nationally relevant tools such as the [Value Transformation Framework \(VTF\)](#), and HRSA's Site Visit Protocol. Previously underdeveloped and emerging skillsets have been added to keep C-suite leaders poised for future advancements.

Each competency includes five (5) generalized skill levels ranging from novice (1) to expert (5), geared to support individual growth and role flexibility. The full set of shared competencies is color-coded to reflect rising learning levels.

RECOMMENDED USE

This tool is intentionally broad so it can serve as a flexible framework for the growth of health center leaders. It can be used and adapted to meet local C-Suite leadership needs and strategic health center goals. This resource can be used as a:

- Self-assessment and growth planning resource for current and emerging C-suite leaders.
- Guide for CEOs to structure professional development conversations with senior leaders.
- Shared language for boards, human resource teams, and search firms to support role design, candidate recruitment, and performance evaluation.
- Foundation for competency-based learning programs, training initiatives, and leadership pipelines.

INTENDED IMPACT

By clarifying and elevating the shared skills required for successful executive FQHC leadership, this tool aims to:


- Strengthen collaboration across the C-Suite and within leadership teams.
- Promote excellence in health center operations and mission fulfillment.
- Enhance leadership development efforts that are intentional and aligned with value-based care.
- Build a common competency foundation for the next generation of community health leaders.

This competency framework can build insight, agility, and confidence for the staff leading our nation's essential safety net, and advance excellence when resources are limited while demand is high.

DISCLAIMER: This tool is subject to continuous improvement and will change over time based on events impacting health centers and feedback on its implementation.

NOVICE TO EXPERT COMPETENCY LEVELS: DESIGNED FOR GROWTH

LEVELS	DESCRIPTION
<p style="text-align: center;"> 1 Novice</p>	<p>Performance at the novice level may demonstrate “book” knowledge of many skills, but with relatively little experiential knowledge.</p> <p>Key Descriptors: Reliance on rules, needs ongoing supervision/training. Aim: general skill and knowledge development</p>
<p style="text-align: center;"> 2 Advanced Beginner</p>	<p>Performance at the Advanced Beginner level demonstrates experience in some situations. Experience is at the initial stages of fully understanding the various complexities of those situations.</p> <p>Key Descriptors: Partially independent. Aim: understanding role and learning relevant information to navigate complexity</p>
<p style="text-align: center;"> 3 Competent</p>	<p>Performance at the Competent level shows enough experience to independently complete most tasks and grasp multiple aspects of complex situations but also may feel overwhelmed at times.</p> <p>Key Descriptors: Reliable and independent. Aim: learn more complexity to enhance knowledge and skills</p>
<p style="text-align: center;"> 4 Proficient</p>	<p>Performance at the Proficient level demonstrates a significant amount of experience. Situations are approached holistically and intuitively, while navigating the interdependence and priority of various aspects of the situation.</p> <p>Key Descriptors: Proactive and efficient. Aim: advancing facility-wide performance and professional affiliations</p>
<p style="text-align: center;"> 5 Expert</p>	<p>Performance at the Expert level demonstrates an enormous experiential background with rapid assessment and response to situations by efficiently zeroing in on and implementing the best courses of action.</p> <p>Key Descriptors: Innovative and intuitive as a leader and partnership building, linking health center to the regional/national/world perspective. Aim: navigate emerging issues strategically, grow external partnerships, always enhance knowledge with internal and external colleagues</p>



Competencies that are fully shared across all C-suite roles are noted with this star symbol.

SHARED COMPETENCIES AND THE VTF

Organizing the 48 Shared Competencies around the [Value Transformation Framework](#) ensures FQHC leadership development is mission-aligned, practical, and adaptable for the future. The VTF's three domains—People, Infrastructure, and Care Delivery—mirror the core areas where executive leadership drives impact. The shared competencies can be further divided along the 15 “change areas” of the VTF. By grounding competencies in the VTF, health centers can build leadership capacity that supports sustainable transformation and the Quintuple Aim of improved health outcomes, improved provider and patient experiences, cost efficiency, and greater access.

Ultimately, the shared competencies are designed to strengthen:

- Strategic leadership rooted in data and systems-thinking
- Team-based and interdisciplinary collaboration across C-suite roles and goals
- Focus on quality, compliance, value-based care, and value-based payment models

Understandably, shared competencies for FQHC leaders are relevant along *several* VTF domains and change areas. This toolkit is organized according to one possible alignment for the shared competencies along the VTF:

I. People

Shared Competency focus: Workforce, leadership, team dynamics, and culture.

Patients

- Patient Empowerment (pg.7)

Care Teams

- Care Team Recruitment (pg.8)

Governance & Leadership

- Board Support & Collaboration (pg. 9)
- Business Continuity Planning (pg.10)
- Business Intelligence (pg.11)
- Change Management (pg.12)
- Communication & Marketing (pg.13)
- Emotional Intelligence (pg.14)
- Ethical Leadership (pg.15)
- Health Center Model (pg.16)
- Management (pg.17)
- Market Awareness (pg.18)
- Mentoring & Motivation (pg.19)
- Project Planning (pg.20)
- Self-Assessment and Growth (pg.21)
- Strategic Planning (pg.22)
- Workplace Safety (pg.23)

Workforce

- Health Center Staffing (pg.24)
- Personnel Management (pg.25)
- Teamwork (pg.26)
- Training Programs (pg.27)
- Work-Life Balance (pg.28)

Partnerships

- Contracting (pg.29)
- Partnerships (pg.30)
- State and Regional Networking (pg.31)

II. Infrastructure

Shared Competency focus: systems, data, technology, and financial stability.

Improvement Strategy

- Clinical Credentialing/Privileging (pg.32)
- Health Center Program Compliance (pg.33)
- Quality Improvement/Management (pg.34)
- Quintuple Aim (pg.35)
- Risk Management (pg.36)
- UDS Reporting (pg.37)

Health Information Technology

- Data Security (pg.38)
- Data-Driven Decision Making (pg.39)
- Electronic Health Records (EHRs) (pg.40)
- Interoperable Technology (pg.41)
- Technological Proficiency (pg.42)
- Telehealth & Virtual Care (pg.43)

Payment

- Fundraising (pg.44)
- Reimbursement Mechanisms (pg.45)
- Pharmacy Operations (pg.46)

Cost

- Capital Budget (pg.47)
- General Accounting Principles (pg.48)
- Purchasing (pg.49)

Policy

- Policy Promotion (pg.50)

III. Care Delivery

Shared Competency focus: Patient care, quality, outcomes, and community health.

Population Health Management

- Population Health (pg.51)

Patient-Centered Medical Home (PCMH)

- PCMH Focus & Accreditation (pg.52)

Evidence-Based Care

- Clinical Processes (pg.53)

Care Coordination & Management

- New Care Models (pg.54)






Non-Clinical Impacts on Health

- Non-Clinical Impacts on Health (pg.55)

SHARED COMPETENCIES: People - Patients

Patient Empowerment






Demonstrate a deep commitment to integrated and patient-centered care, wellness, patient-empowerment, and health promotion by advancing models like the Patient-Centered Medical Home and value-based care that prioritize outcomes, access, and whole-person health.

LEVEL	SKILLS/TASKS
	<p>I am aware of the importance of patient self-management, integrated care, and wellness promotion, including foundational models like PCMH, but I have not yet participated in implementing or evaluating such approaches.</p>
	<p>I understand the risks of fragmented care and the benefits of coordinated, team-based care that supports patient self-management. I recognize how PCMH principles and value-based care models can lead to better patient outcomes and improved population health.</p>
	<p>I support and help implement programs that promote integrated, patient-centered care and align with PCMH principles. I work with clinical and operations teams to ensure care delivery supports self-management, closes health gaps, and meets value-based performance goals.</p>
	<p>I institutionalize PCMH-aligned models of care that are team-based, data-driven, and responsive to patient and community needs. I ensure our systems are positioned to succeed under value-based care contracts by aligning incentives, improving care coordination, and investing in preventive and enabling services.</p>
	<p>I advocate for policies and funding that sustain patient-centered medical home models and accelerate the shift to value-based care. I engage at the state and national level to share our health center's innovation in whole-person care and population health. I mentor emerging leaders and guide organizational transformation to ensure long-term alignment with integrated, patient-driven, value-based care delivery.</p>

People – Care Teams

Care Team Recruitment






Develop and implement a successful care team recruitment and retention program for all levels of clinical and support staff in partnership with the c-suite and clinical leadership.

LEVEL	SKILLS/TASKS
	<p>I am aware of the importance of effective care team recruitment and retention strategies, as well as compensation models. I recognize that workforce stability, especially for doctors, nurses and specialists, is critical to patient care, staff morale, and operational sustainability.</p>
	<p>I understand the core elements of care team recruitment and retention, including hiring practices, onboarding, and compensation structures. I pay close attention, especially, to ensuring desirable provider compensation and work conditions.</p>
	<p>I work collaboratively with the leadership team to develop recruitment plans, address provider shortages, and support onboarding and integration processes. I help ensure compensation packages and support structures are competitive, equitable, and aligned with market standards as well as our financing capabilities.</p>
	<p>I lead initiatives to refine and improve recruitment and retention strategies based on workforce data, care team feedback, and emerging trends. I guide organizational efforts to create a compelling value proposition for care team members, including career development, work-life balance, and innovation.</p>
	<p>I design and champion innovative, long-term workforce strategies for clinical teams that strengthen our talent pipeline and promote organizational resilience. I represent the health center in national and state forums to identify best practices and influence policy that supports care team recruitment and retention in low-access communities.</p>

People – Governance & Leadership






Board Support & Collaboration

Support effective health center governance through governance-level reporting, providing suggestions on possible candidates for the board, and shared responsibility for long-term sustainability.

LEVEL	SKILLS/TASKS
	<p>I understand the structure, responsibilities, organization, and legal obligations of the health center’s Board of Directors, including the HRSA requirement that a majority of board members must be active patients. I recognize the value of the board’s role in advancing our health center mission.</p>
	<p>I support the development of clear, timely governance-level reports on key performance indicators, finances, compliance and/or other important data to inform board oversight. I help board members understand financials, patient experience data, regulatory metrics, and/or other information so we can jointly make informed decisions and meet HRSA expectations, as needed.</p>
	<p>I collaborate with the board in appropriate ways for my role and support regularly updated strategic plans that reflect our mission, growth projections, and community health needs. When requested by the board, I support board level recruitment by following appropriate processes to help board members identify candidates, fill skills and perspective gaps, and ensure the board meets the 51% patient-board member requirement. I help with onboarding and other informational needs (depending on my role) to ensure board members build confidence in their governance roles.</p>
	<p>I undertake analysis (e.g., structured reviews of quality, financial, and/or other performance indicators) and translate the results into appropriate governance-level reports and information that supports the strategic sustainability of health center governance. I support committed work, succession planning, and board education that helps with long-term strategic thinking. I coach and inform staff on the importance and function of the board and board decisions.</p>
	<p>I partner with the board and staff to co-lead long-range planning, generate new initiatives, analyze growth projections, and promote positive policy changes. I ensure the board is equipped to guide the organization through risk, innovation, and transformation. I help position our board as a national model of patient-led governance. I work with staff to create feedback loops that initiate collaborative achievements.</p>






Business Continuity Planning

Collaborate with key stakeholders to develop emergency response, succession and business continuity plans, and lead operations for resiliency during disruptions.

LEVEL	SKILLS/TASKS
	<p>I am learning the frameworks and regulatory requirements for emergency preparedness and business continuity planning specific to health centers. I recognize the importance of planning for operational disruptions but rely on others to lead these efforts.</p>
	<p>I help assess threats to the organization and contribute to building a framework for continuity planning and emergency preparedness in partnership with the board. I generally apply my understanding of the organization's vulnerabilities and regulatory expectations to support planning efforts.</p>
	<p>I can clearly articulate the purpose and value of business continuity planning including leadership succession planning. I know when and how to obtain internal and external resources to strengthen our preparedness efforts. I actively help maintain and test our health center's emergency response and business continuity plans with staff and the board to ensure minimal disruption to operations. I help establish proactive plans to secure our information systems, staffing, financial, and operational systems in the event of disruptions.</p>
	<p>I serve as a trusted resource for emergency preparedness and action through our BCP with regular updates shared throughout the organization. I coach staff, local partners, and peer health centers to strengthen coordinated planning and response efforts. Our health center's fully developed succession, emergency, and BCP have been vetted and approved by our board. I seek and develop more comprehensive external partnerships for ongoing resilience plans.</p>
	<p>I am an experienced leader when it comes to emergency preparedness and business continuity planning. I have transformed the health center into a central hub with emergency power systems. I train others to stay ahead of emerging threats and am up to date on innovative strategies that position health centers to be responsive and effective in times of crisis. I maintain strong partnership with external organizations for resilience during emergencies.</p>

Business Intelligence

Acquire, analyze, and use a strategic methods to transform raw data (market data, health trends, competitor insights) into actionable, mission-driven business decisions.

LEVEL	SKILLS/TASKS
	<p>I am learning about national and regional Key Performance Indicators (KPIs) relevant to health centers and how market analysis influences business planning and development. I understand the value of monitoring market share and basic healthcare trend data.</p>
	<p>I use a variety of data sources like UDS measures, needs assessment data, Health Professional Shortage Areas (HPSAs) and areas with limited health care access to inform services, expand partnerships, and adjust operations. I stay informed about local competitors, capacity, and our current market capture area to develop a growth plan.</p>
	<p>I make business decisions based on national trend data from trusted sources such as NACHC, ACHE, and our Primary Care Association (PCA), in addition to community and health-center specific data. I lead internal SWOT analyses to uncover strategic opportunities and gaps in service, using health status indicators and community needs data to support strategic planning.</p>
	<p>I integrate business intelligence into all my major strategic and operational decisions. I use advanced data tools and predictive analytics to guide service expansion, evaluate competition, and align organizational priorities with changing community demographics and health trends.</p>
	<p>I champion the use of business intelligence to drive innovation. I mentor other leaders on using competitive and health trend data to shape vision and strategy, and I share our analytic approaches and insights with peer organizations and in national learning collaboratives. I often speak publicly about our strategy and notable gains during emergencies.</p>



Change Management






Structure processes to guide the organization and staff smoothly through transitions; incorporating new technology, workflow adjustments, or shifting leadership to best serve our health center mission.

LEVEL	SKILLS/TASKS
1	I am aware that organizational change can impact individuals, teams, and systems in different ways and recognize that both emotional and operational responses must be managed.
2	I can describe key principles of Change Management (clarifying why change is happening, planning the change process, implementing the change effectively, communicating results) for routine situations. I understand how my leadership influences processes and people when undergoing organizational change.
3	I apply Change Management strategies to navigate and support significant transitions. I model self-awareness, promote adaptability, and guide my team through change with clarity and purpose, minimizing disruption and fostering resilience.
4	I lead simultaneous organization-wide change efforts by clearly communicating about transitions with purpose and understanding. I coach internal leaders and staff to align changes with the health center's mission, value-transformation, and continuous improvement. I see documented, positive results with change.
5	I mentor internal and external leaders in proactively leading and implementing structured transition plans. I anticipate future leadership shifts, use proven frameworks to drive transformation including the Value Transformation Framework, and embed agile systems into the health center's strategic operations.



Communication & Marketing






Lead, model, and strengthen integrated communication and marketing strategies that promote the health center's mission, build trust with internal and external audiences, elevate the brand, and drive community engagement and strategic impact.

LEVEL	SKILLS/TASKS
	<p>I understand the types of communication and marketing tools we use such as patient education materials, reports to funders, presentations to community groups, social media with constituents, and who we reach through each tool. I recognize how timely, clear, and respectful communication builds trust and promotes the health center. I seek feedback before finalizing communications to ensure clarity and appropriateness, and I follow basic social media guidelines.</p>
	<p>I communicate clearly and concisely in meetings and written formats, producing content that aligns with organizational goals. I tailor communication for specific audiences and platforms, using basic marketing principles and market research. I contribute to presentations and outreach efforts that promote the health center's work. I model professionalism and respectful dialogue across all platforms.</p>
	<p>I contribute to various strategic marketing and communication plans that align with our mission and audience needs. I develop polished materials and content that promote key initiatives and organizational accomplishments. I use LinkedIn and other professional channels to highlight staff achievements and community impact. I encourage all staff to communicate with consistency, clarity, transparency, and stakeholders in mind.</p>
	<p>I collaborate across teams to clarify complex topics, prioritize messaging, and align communication efforts with strategic priorities. I contribute to messaging frameworks and campaign calendars. I facilitate public conversations online and in-person about the health center's role in addressing critical health issues. I use data to track outreach, marketing performance, and adapt tactics as needed. I coach others in effective communication.</p>
	<p>I serve as a visible ambassador for the organization, communicating with authority and clarity to inspire trust and strengthen our reputation. I contribute to blogs, op-eds, media outreach, and public statements that reflect the values and goals of the health center. I model effective communication in times of crisis and regularly invest in brand-building. I sustain relationships with the media, funders, elected officials, and the public. I guide organization-wide communication strategies that elevate both mission impact and community connection.</p>



Emotional Intelligence (EI)

Lead with empathy, self-awareness, stress management, and social insights by recognizing, understanding, and managing my own emotions, and by building strong relationships with mutual respect.

LEVEL	SKILLS/TASKS
 1	I am aware of the concept of Emotional Intelligence (EI) but have limited intentional application in my leadership practice.
 2	I understand the core components of EI and actively apply them to increase my self-awareness, regulate my emotions, and manage stress and reactions in professional settings.
 3	I consistently apply EI when working with my team, using empathy, social awareness, and thoughtful communication to build trust, navigate conflict, and maintain morale.
 4	I coach my team in emotional intelligence practices in self-awareness, self-management, social awareness, and relationship management. My teams have strong interpersonal relationships and apply EI principles within team dynamics, clinical services, and partnerships.
 5	I contribute to building an organizational framework based on emotional intelligence and serve as a resource and mentor to others inside and outside the organization on EI models like crisis management and psychological safety.



Ethical Leadership






Lead with a sense of mission-driven integrity, trust, and respect, modeling the highest standards of ethical behavior in accountability, transparency, and fairness in decision-making. Ethical leaders create a workplace environment based on ethical conduct, abiding by laws such as the Federal Tort Claims Act, and respectful relationships.

LEVEL	SKILLS/TASKS
1	I recognize my influence stems from my position or authority. I understand the importance of high ethical standards and seek to learn more about ethical frameworks, professional integrity, and respectful conduct in leadership. I strive to model professionalism and accountability.
2	I actively build relationships based on trust and mutual respect. I understand the HRSA compliance and funding structures relevant to ethics and recognize how to address sensitive topics (e.g., patient autonomy, confidentiality, public health ethics). I communicate my values and aim to model behaviors that create a sense of safety, fairness, and belonging among staff and patients.
3	I strive to apply ethical principles in decision-making, problem-solving, and goal setting. My leadership is results-driven and grounded in objectivity and fairness. I embed transparency in our systems and work hard to generate trust among the board, staff, patients, vendors and partners through an environment that yields shared achievements, mutual respect and honesty. I prevent opportunities that risk conflicts of interest.
4	My leadership expands beyond task execution to include coaching others in ethical thinking, self-awareness, and professional development. I support staff in navigating complex ethical scenarios and help them cultivate deep respect for others. I encourage growth, often using tools like Myers-Briggs or DISC assessments to elevate team-based achievements. I coach board members and staff in the ethical dimensions of our work and promote accountability and inclusivity in every interaction.
5	I foster an organization based on respect, transparency, and integrity are foundational. I champion ethical reflection as well as individual and team accountability as essential to our mission and vision. I inspire loyalty, motivate change, and consistently lead with humility, fairness, and purpose.



Health Center Model






Fully appreciate and clearly understand the unique dynamics, history, structure, and future direction of the community health center model and its role in advancing health care access and the Quintuple Aim.

LEVEL	SKILLS/TASKS
 1	I am actively learning about the origins of the health center movement, its mission-driven foundation, and its role in addressing health disparities in low-access communities.
 2	I understand how federal and state partners aim to support the health center model (e.g., HRSA, BPHC, Medicaid). I'm learning the various FQHC reporting requirements that guide health center compliance, funding, and performance.
 3	I can clearly explain how state and national healthcare systems rely on the health center model, and can explain to staff how our health center fits in. I understand how policy, reimbursement, and community needs shape the delivery of care at our health center, and apply this knowledge to operations and reporting.
 4	I analyze and anticipate trends such as workforce shifts, payment reform, value-based care, and policy changes that will shape health center operations over the next 5 to 10 years. I apply this insight to long-term planning and decision-making.
 5	I serve as a thought leader who helps shape and advance national priorities for the health center movement. I influence state and national discussions, mentor emerging leaders, and represent the model's impact to policymakers and partners.








Management

Demonstrate the ability to lead and apply principles of time, project, and meeting management to drive operational excellence, staff coordination, and performance monitoring aligned with organizational priorities and health center goals.

LEVEL	SKILLS/TASKS
 1	I have limited training or experience with formal time, project, or meeting management tools. I may benefit from training or guidance to manage priorities or team workflows that drive operational excellence.
 2	I am comfortable using the fundamental concepts of time management, structured meetings, and project coordination. I contribute to team planning efforts and recognize the importance of performance monitoring aligned with organizational priorities.
 3	I apply structured project management techniques to coordinate cross-departmental efforts. I assign responsibilities, track progress, adjust plans as needed. I facilitate staff meetings using recognized management strategies to ensure successful task completion.
 4	I collaborate on health center-wide planning, forecasting, and process coordination. I coach peers and teams on how to anticipate and prepare for operational challenges using project management tools and scenario planning templates. I employ project management tools and templates.
 5	I develop and champion new, informed approaches to time and project management focused on productivity, cost efficiency, and optimizing resource use. I institute systems that align day-to-day operations with strategic goals, leading to measurable improvements in outcomes and efficiency.

Market Awareness






Lead strategic efforts to use health sector market data and insights from staff and patients to advance the health center mission and position the health center as a trusted employer, provider, and partner of choice.

LEVEL	SKILLS/TASKS
 <p>1</p>	<p>I recognize the importance of market-informed outreach when trying to raise awareness about the health center and drive the utilization of health center services. I seek training and knowledge to better understand how community needs and perceptions influence our service delivery and reputation.</p>
 <p>2</p>	<p>I develop and share audience-targeted messages and marketing tactics that can increase the utilization of health center services. I understand key elements of becoming an "Employer, Provider, and Partner of Choice" and the benefits of providing value-based care, and how these business imperatives can shape our marketing efforts. I use a variety of data insights to support communication planning.</p>
 <p>3</p>	<p>I ensure our brand identity is consistent across internal and external messaging. I work with teams to develop new services, innovations, and strategic shifts based on patient and staff insights and data, and market those developments. I use performance metrics and community feedback to continuously improve our communication and outreach strategies</p>
 <p>4</p>	<p>I encourage learning and ensure staff at all levels understand and support new offerings and engagement strategies based on data and feedback loops. I align marketing, patient engagement, and outreach functions to effectively communicate services across multiple communication channels. I actively build partnerships with schools, local employers, and community organizations to elevate visibility and trust in our EPPoC and value-based care brand.</p>
 <p>5</p>	<p>I design and execute system-wide strategies to achieve recognition as a health center "Employer, Provider and Partner of Choice," and collect data to show improvement in these areas as well as value-based care. I mentor other health center leaders in applying data and feedback loops to improve outreach, partnerships, and expand our reputation. I lead cross-sector collaborations that solidify the health center's role as a vital and responsive community anchor.</p>



Mentoring & Motivation

The ability to coach, inspire, and develop individuals and teams to perform at their best, cultivate future leaders, and sustain a culture of purpose, growth, and shared success in alignment with the health center's mission and the goals of the Quintuple Aim.

LEVEL	SKILLS/TASKS
	<p>I understand that strong leaders motivate and develop others. I am learning and applying basic principles of supervision, coaching, and people development, and I recognize the importance of mentorship in leadership growth. I see how inspiration and recognition improve performance and retention in a mission-driven setting.</p>
	<p>I provide close supervision and structured training for newer or less experienced staff. I offer support, model tasks, and guide staff through daily responsibilities to help them gain confidence and competence. I communicate how individual contributions connect to the health center's mission, and I use positive reinforcement to build engagement.</p>
	<p>I build capable, self-directed teams through intentional hiring, coaching, and development. I delegate responsibilities clearly and support autonomy while offering consistent, constructive feedback. I actively recognize achievements, link daily work to strategic goals, and foster a positive environment where staff and board members feel valued and motivated to pursue excellence.</p>
	<p>I mentor emerging leaders through stretch assignments, coaching, and sponsorship for cross-functional and leadership opportunities. I use tools like personality assessments and coaching models (e.g., GROW or Situational Leadership) to tailor my motivational approach for individuals across roles and backgrounds. I promote shared goals, professional development, and a sense of purpose tied to the Quintuple Aim.</p>
	<p>I shape the leadership pipeline by mentoring senior leaders to think strategically, operate independently, and lead collaboratively. I influence internal talent-building strategies and promote leadership development across broader networks. I cultivate a culture of excellence, mission alignment, and continuous improvement where engagement, accountability, and shared accomplishment are sustained over time. I model a deep commitment to staff growth and organizational success.</p>



Project Planning






Demonstrate strategic foresight, business acumen, and creativity in project planning by using data and cross-functional collaboration to design, implement, and scale initiatives that advance the health center’s mission, improve operational performance, and drive sustainable growth.

LEVEL	SKILLS/TASKS
<p style="text-align: center;">1</p>	<p>I understand the basic expectations for strategic planning and growth at my health center. I am exploring training in strategic planning and seek current opportunities for project planning with internal partners.</p>
<p style="text-align: center;">2</p>	<p>I use tools for basic data analysis to identify trends and align my work with the health center’s strategic goals. I contribute to operational plans that support our mission and demonstrate a clear understanding of our vision, values, and service to low-access populations. I aim to strengthen my planning skills.</p>
<p style="text-align: center;">3</p>	<p>I anticipate future organizational needs by analyzing internal data and external trends in the healthcare landscape. I develop clear, measurable project plans with defined roles, responsibilities, and timelines. I monitor performance, report progress to stakeholders, and adjust plans when deliverables are off track. I lead cross-departmental teams in designing and implementing strategic initiatives that support clinical, financial, and operational goals.</p>
<p style="text-align: center;">4</p>	<p>I assist in developing an integrated strategic plan that align with organizational goals. I adapt to changes in the external environment. I invest in strong data analytics capabilities within the organization and project management tools (such as Asana) to structure decision-making and program implementation. I encourage innovation, experimentation, ideas, and embed business intelligence into the organization’s daily operations. I ensure risk mitigation, resource alignment, and stakeholder engagement are embedded in every major planning effort.</p>
<p style="text-align: center;">5</p>	<p>I inspire collaborative planning at the community, state, or national levels to shape the future of health center delivery and impact. I champion innovative, large-scale initiatives that advance policy, finance, and practice in support of low-access communities. I invest in accessible, data-informed financial tools to support growth planning and cash flow management across the organization and sector. I share best practices and mentor other leaders on building scalable and sustainable strategies for health center transformation.</p>



Self-Assessment and Growth

Continually use a self-assessment process to evaluate my leadership capabilities, seek feedback, and pursue learning experiences that can expand my personal and professional growth in alignment with the mission and evolving demands of the health center.

LEVEL	SKILLS/TASKS
	<p>I have completed a structured self-assessment to establish a clear baseline of my strengths and development areas. I engage my CEO and peers in honest dialogue about my personal and professional goals.</p>
	<p>I participate in relevant learning and development opportunities to achieve my growth goals. I ensure these goals are reflected in my annual performance review and used as a guide for my personal, continuous improvement.</p>
	<p>I follow a self-directed professional development plan and seek opportunities beyond my comfort zone. I take initiative to engage with PCA and HCCN resources and targeted training. I regularly seek feedback from peers, mentors, and the leadership team to refine my leadership practice.</p>
	<p>I regularly review my personal development progress, take action to learn new leadership strategies in service of our mission, and engage with structured self-assessments and strategic reflection. I use these insights to refine my personal short- and long-term leadership goals and obtain training for continuous improvement.</p>
	<p>I proactively anticipate future leadership demands with scenario planning for the next 3, 5, 10 or more years. I stay current by reading a variety of industry publications including those from adjacent sectors. I foster trusted relationships with peers and mentors and use their candid feedback to continuously improve my leadership and challenge my assumptions in service of our mission.</p>








Strategic Planning

The ability to develop and execute a shared vision using systems thinking, aligned with a long-term plan that meets metrics for community needs and clinical, operational, and financial performance improvements.

LEVEL	SKILLS/TASKS
<p style="text-align: center;">1</p>	<p>I am aware of the health center's strategic plan and recognize the importance of systems-thinking aligned with clinical, administrative, and operational goals, but I rely on others to interpret implications. I understand the distinction between strategic and tactical thinking but am learning where to turn for implementation.</p>
<p style="text-align: center;">2</p>	<p>I understand how our strategic plan reflects the input and needs of major stakeholders. I can identify how misalignment between clinical, operational, and financial strategic systems and objectives can impact performance. I can differentiate between strategic thinking and day-to-day tactical decisions.</p>
<p style="text-align: center;">3</p>	<p>I empower teams to execute our immediate strategic plan and regularly update the board on progress. I manage goal alignment across departments and develop Key Performance Indicators (KPIs) and benchmarks. I coach staff to become advocates and Subject Matter Experts (SMEs) in their work, aligned with the health center's strategic vision. All teams contribute to achieving measurable objectives in the plan, and in identifying actionable system-improvements.</p>
<p style="text-align: center;">4</p>	<p>I work with cross-functional teams to align clinical and administrative priorities with the strategic plan. I communicate results internally, to the board, and to partners. I conduct staff-wide planning sessions to update the existing plan using systems thinking. I use structured decision-making processes to challenge the status-quo and project 3, 5 and 10 year goals to become the Employer, Provider, and Partner of choice delivering value-based care.</p>
<p style="text-align: center;">5</p>	<p>I advocate for adaptive systems that support the interconnectedness of clinical excellence and business sustainability. I shape organizational frameworks to embrace continuous learning, benchmarking, and foresight. I share successful planning and alignment practices across the health center field. I use progress and lessons learned from past and current strategic plans to drive future innovation.</p>

Workplace Safety






Lead and model a health center culture of psychological and physical safety: where staff and patients experience trust, transparency, respect, and protection from harm. Promote policies, behaviors, and systems that reduce fear, prevent incidents, and elevate whole-person experiences across all operations.

LEVEL	SKILLS/TASKS
	<p>I recognize that a culture of safety, both psychological and physical, is foundational to patient care, staff engagement, and organizational success. I observe how leadership behaviors, communication, and team dynamics influence staff well-being and patient experiences. I understand the importance of workplace safety standards and compliance frameworks that support worker satisfaction.</p>
	<p>I understand key drivers of a safe, transparent, and respectful workplace. I support open communication and transparency and use tools like workplace safety reports and feedback loops to monitor concerns, complaints, or signs of fear-based behaviors. I promote simple, role-appropriate solutions that enhance daily operations without adding unnecessary burden. I am familiar with approaches to increase both psychological safety and compliance with safety standards.</p>
	<p>I foster a workplace where trust, open dialogue, and mutual accountability are embedded in team operations. I implement onboarding, training, and operational practices that uphold safety expectations and reduce fear-based dynamics. I promote SMARTIE goals to improve both psychological and physical safety, and partner across departments to address safety concerns, patient complaints, and engagement issues. I advocate for real-time systems and technology that support a healthy and responsive environment.</p>
	<p>I collaborate across teams to identify root causes of safety issues (interpersonal, procedural, or environmental) and design cross-functional strategies to resolve them. I coach other leaders to model transparency, equity, and trust-building. I champion workplace safety as a core value, setting expectations for zero preventable harm and high staff morale. I work to align safety and psychological well-being with strategic priorities and quality improvement goals.</p>
	<p>I serve as an executive leader and champion for a safety-first culture that integrates psychological safety, patient experience, and workplace safety compliance into all aspects of health center operations. I guide long-term initiatives that center human dignity and safety, internally and with external partners. I mentor others, contribute to the broader field by sharing best practices, and inspire other organizations to model values-based approaches to care and workplace culture.</p>

People – Workforce

Health Center Staffing

Demonstrate knowledge of staffing requirements and patterns to support the strategic direction, programmatic goals, and operational sustainability for all elements of the health center.

LEVEL	SKILLS/TASKS
	<p>I can define basic staffing concepts such as staffing patterns and models. I am learning about our health center's current staffing strategy and understand the various staff rolls and responsibilities across departments.</p>
	<p>I can clearly describe our health center's staffing model and explain how it aligns with our strategic goals and service delivery needs. I understand how different positions, scopes of practice, and staffing ratios support patient care and operational performance.</p>
	<p>I work with department leaders to assess staffing needs across the organization based on program goals, patient demand, and quality benchmarks. I identify gaps in staffing and make informed recommendations to adjust patterns or deploy staff more effectively to meet changing priorities.</p>
	<p>I seek to align workforce planning with strategic initiatives, budget forecasting, and service expansion plans. I help develop models that integrate productivity, cost-efficiency, excellence, and ensure recruitment and retention strategies are data-driven and forward-looking.</p>
	<p>I drive the evolution of our staffing strategy by introducing innovative workforce models that improve care access, team-based practice, and long-term sustainability. I collaborate with external partners (e.g., academic institutions, professional associations) to ensure pipeline development, succession planning, and alignment with future health center priorities.</p>



Personnel Management

Effectively carry out all relevant health center personnel management functions, ensuring a focus on accountability, development, and continuous improvement.

LEVEL	SKILLS/TASKS
1	I understand the responsibilities involved in managing personnel, although I have limited experience supervising others. I seek opportunities to build my knowledge through seminars, workshops, and quality improvement initiatives. I understand basic data reporting tools and contribute to data collection and analysis for use in team and organizational decisions.
2	I apply core personnel management principles and offer guidance as a leader, for supervision, performance evaluation, and progressive discipline. I support recruitment and retention efforts and contribute to building a sense of excellence. I can articulate how performance and quality tools align with our health center's mission, vision, and values.
3	I confidently manage staff by delivering clear feedback, conducting timely and respectful performance reviews, and offering real-time coaching. I celebrate staff accomplishments and proactively address challenges to support individual and team growth and joy in work.
4	I mentor and coach other supervisors on conducting evaluations, providing feedback, and retaining top talent. I model effective personnel practices and support others in strengthening their teams through strategic recruitment and engagement. I also nurture an active board with a collaborative approach to leadership.
5	I design and lead a comprehensive staffing strategy that aligns with health center goals. I create interview tools and structured hiring practices for key roles and lead the development of innovative retention strategies that promote a fulfilling, inclusive, and mission-driven work environment.








Teamwork

Promote an environment of collaboration in ways that help staff leverage the strengths of each individual and achieve results that are greater, as a team than what any single person could accomplish.

LEVEL	SKILLS/TASKS
<p style="text-align: center;">1</p>	<p>I can conceive how to form and maintain truly interdisciplinary teams and recognize the value of teamwork in delivering better patient care.</p>
<p style="text-align: center;">2</p>	<p>I actively participate in team meetings, listen, share relevant information (as permitted by HIPAA), encourage innovation, and identify informal ways to connect and collaborate regularly with team members. I have begun to think more strategically about how to strengthen existing teams or develop new multi-disciplinary teams for better patient care services.</p>
<p style="text-align: center;">3</p>	<p>I encourage shared decision-making and find efficient and timely ways to ensure relevant information is shared among all team members. I encourage proactive ways to address issues, gather input from different layers of staff, and help shape innovation, mutual respect, and team-based collaboration for to achieve organizational and Quintuple Aim goals.</p>
<p style="text-align: center;">4</p>	<p>I oversee the coordinated efforts of broad clinical and administrative teams, and incorporate partners, stakeholders, funders, and patients as relevant. I promote a clear understanding of each team member's role and integrate a variety of clinical disciplines (like dental or behavioral health) and non-clinical disciplines (like IT and finance) to work toward strategic and shared health center goals.</p>
<p style="text-align: center;">5</p>	<p>I advocate for adaptive systems that support the interconnectedness of I establish a consistent schedule for one-on-one meetings to support each team member's development and address emerging issues that support multi-disciplinary team achievements. I anticipate potential conflicts and offer guidance to ensure long-term collaboration and success. The board, stakeholders, and funders recognize the positive and measurable impacts of our health center's team-based approach.</p>

Training Programs






Identify learning needs for health center staff and implement training and technical support programs that improve operational processes, policies, and procedures.

LEVEL	SKILLS/TASKS
 <p>1</p>	<p>I understand the importance of lifelong learning and training for health center operations. I know where to find policies, procedures, and learning resources.</p>
 <p>2</p>	<p>I can access training and support resources to improve health center practices, policies, and procedures and recognize when additional staff development is needed. I ask staff about training needs they perceive and connect teams with related training resources or technical assistance.</p>
 <p>3</p>	<p>I regularly assess staff development needs based on operational goals, regulatory changes and performance trends. I coach team members to engage with relevant training as needed. I contribute to the refinement of training goals and resources. I clearly articulate, at meetings, how staff capabilities can impact key metrics/indicators and operations, and how training can influence staff roles in those processes.</p>
 <p>4</p>	<p>I regularly assess staff development needs based on operational goals, regulatory changes and performance trends. I coach team members to engage with relevant training as needed. I contribute to the refinement of training goals and resources. I clearly articulate, at meetings, how staff capabilities can impact key metrics/indicators and operations, and how training can influence staff roles in those processes.</p>
 <p>5</p>	<p>I develop and implement system-wide strategies for workforce development, board development, succession planning, and learning sustainability. I secure funding or partnerships to support ongoing professional development and technical assistance. I leverage predictive analytics and feedback loops to ensure training is effective, aligns with strategic goals, and supports operational excellence (e.g., with value based care, technology adoption, non-clinical management).</p>



Work-Life Balance






Sustain a healthy and fulfilling balance between professional responsibilities, pride in work, and personal well-being. Model peak performance and resilience, while fostering supportive, balanced, and meaningful work across the health center.

LEVEL	SKILLS/TASKS
	<p>I recognize that both joy in work and balance outside of work contribute to energy, focus, and productivity. I am learning about the personal, relational, and other factors that diminish joy and increase burnout. I use basic time-management tools (like task lists) and understand that maintaining a healthy lifestyle outside of work helps sustain fulfillment and effectiveness on the job.</p>
	<p>I set realistic expectations for my time, delegate appropriately, and recognize that overwork is not a sustainable measure of dedication. I practice stress management and aim to connect with co-workers in meaningful social activities. I recognize how poor communication, lack of recognition, unclear expectations, and inefficient systems can harm morale and diminish joy in work.</p>
	<p>I incorporate stress-relief and renewal practices into my daily routines (e.g.: not eating lunch at my desk, stepping outside, etc.) and encourage staff to do the same. I facilitate conversations with staff to spark creativity and co-create system improvements to fosters joy and well-being. I make time for family, hobbies, and community service, reinforcing the value of whole-person well-being and social connection.</p>
	<p>I dedicate time to work with teams to reduce burnout and disconnection by improving workflows, communication, psychological safety, and feedback processes. I consistently model healthy time management, remain accountable, and model enjoyment and mission-driven pride from participation in community, civic, and cultural activities.</p>
	<p>I lead with respect for balance, well-being, and joy by embedding these values into the health center’s strategy, systems, and norms. I promote flexible scheduling and inclusive engagement practices. I empower others to lead in my absence, mentor emerging leaders in sustainable practices, and champion solutions that cultivate meaning, purpose, belonging, and resilience at every level of the organization.</p>

People – Partnerships






Contracting

Lead or support the negotiation, implementation, and performance monitoring of value-based payment, Medicare/Medicaid, private payer contracts, and subaward contracts. I ensure contracts align with the health center's mission, financial sustainability, sliding-fee payment models and regulatory compliance.

LEVEL	SKILLS/TASKS
 <p style="text-align: center;">1</p>	<p>I understand the basic concepts of managed care, Medicare/Medicaid and third-party payer contracts with State, Federal, and private entities. I am familiar with common terms (e.g., capitation, fee-for-service, withhold, and risk-sharing, sliding fees). I am aware of how these contracts relate to the health center's service delivery and reimbursement.</p>
 <p style="text-align: center;">2</p>	<p>I apply my working knowledge of risk-based and value-based contracts and the role of clinical and financial metrics in contract negotiation and compliance. I assist in preparing documentation for Federal Tort Claims Act (FTCA) deeming or redeeming. I help ensure provider credentialing and privileging align with contracting and regulatory requirements. I am familiar with subawards contracted through the health center.</p>
 <p style="text-align: center;">3</p>	<p>I strive to implement managed care, Medicaid, Medicare, and accountable care organization (ACO) contracts, including the operational readiness and documentation of quality, utilization, and cost performance metrics. I work with finance, clinical, and QI staff to ensure deliverables and deadlines are met and performance data is tracked and reported. I manage and monitor sub award contracts.</p>
 <p style="text-align: center;">4</p>	<p>I evaluate contract terms to ensure alignment with the health center's financial goals, patient population needs, and value-based care models. I coach department leads in understanding contract implications for performance and revenue. I proactively identify opportunities for renegotiation, risk adjustment, billing practice improvements, or participation in alternative payment models (APMs). I develop streamlined processes to manage and monitor sub award contracts.</p>
 <p style="text-align: center;">5</p>	<p>I lead contract strategy development and serve as a health center representative in payer negotiations, collaborative ACOs, or state-level initiatives. I shape contractual approaches that support health care access, care integration, and population health outcomes. I mentor others in designing win-win partnerships that expand access, reimbursement opportunities, and sustainability. I develop new pathways for mission-aligned subaward contracts.</p>

Partnerships

Develop, nurture, and lead mutually beneficial partnerships with organizations from healthcare, community-based, academic, philanthropic, and the private-sector to strengthen the health center's mission, visibility, sustainability, and impact.

LEVEL	SKILLS/TASKS
	<p>I recognize the importance of external partnerships and collaborations in advancing the health center's mission. I am aware of the need to seek funding and strategic support from external organizations, including private donors, to ensure long-term sustainability.</p>
	<p>I understand how to maintain existing partnerships with shared goals and clear communication. I can identify and cultivate new opportunities for collaboration and understand the fundamentals of private donor engagement. I understand the importance of partnerships for comprehensive patient care and care transitions.</p>
	<p>I actively seek, develop, and manage partnerships that expand the health center's services, visibility, and community reach. I contribute to shared initiatives with clarity around mutual benefit and accountability. I engage with private and philanthropic funders and can articulate a compelling case for support, linked to our strategic goals. I collaborate closely with partner organizations involved with sharing whole-person care for our patients, and care transitions.</p>
	<p>I lead strategic partnerships aligned with the health center's mission and long-term vision. Together we ensure measurable outcomes and shared ownership. I foster cross-sector collaborations and represent the organization in external forums. I develop formal partnership agreements with funders, coalitions, and community leaders. I mentor emerging leaders on relationship-building and donor engagement.</p>
	<p>I build high-impact partnerships at the regional and national levels that influence health policy, unlock transformational funding, or scale innovation. I initiate visionary collaborations that align multiple organizations around mutually beneficial goals to improve patient care. I am known to cultivate trust-based relationships that elevate the health center's profile and create enduring value across sectors.</p>



State and Regional Networking






Cultivate and leverage strategic relationships with Primary Care Associations (PCAs) and Health Center Controlled Networks (HCCNs) and other State/Regional partners to increase access to funding, knowledge, reach, and policy resources at local, state, and national levels.

LEVEL	SKILLS/TASKS
<p style="text-align: center;">1</p>	<p>I am learning about the health center’s current relationships with regional partners how organizations like HCCNs, PCAs, and other state and local agencies influence our work. I am building awareness of the broader ecosystem that supports our mission.</p>
<p style="text-align: center;">2</p>	<p>I understand how strategic relationships with HCCNs, PCAs, and others can enhance the health center’s operations, influence, and sustainability. I actively pursue opportunities to attend trainings and community events where I can build external connections that align with our strategic goals.</p>
<p style="text-align: center;">3</p>	<p>I attend conferences and convenings by our HCCN and PCA to deepen my knowledge of industry players and best practices. I actively seek opportunities to collaborate with these state and regional partners to strengthen our service delivery and financial health.</p>
<p style="text-align: center;">4</p>	<p>I help shape training or networking initiatives at the state or national level that benefit the health center field. I regularly introduce PCA and HCCN colleagues to key partners—vendors, funders, thought leaders—that can foster broader collaboration and shared success across health centers in our state/region.</p>
<p style="text-align: center;">5</p>	<p>I am recognized as a strategic thought leader in the health center community. I actively lead trainings, panels, and policy conversations with PCAs, national associations, or funders, using my influence to strengthen partnerships that advance the health center mission and the broader health center system.</p>

Infrastructure – Improvement Strategy






Clinical Credentialing/Privileging

Oversee and guide the health center's process for credentialing (ensuring providers are qualified) and privileging (setting standards for actions providers can take) to ensure compliance with regulatory standards, minimize risk, and expedite the delivery of high-quality care.

LEVEL	SKILLS/TASKS
	<p>I understand credentialing and privileging are essential to ensure only qualified providers deliver care in the most efficient ways, and I recognize the importance of strong credentialing and privileging processes for compliance and risk mitigation.</p>
	<p>I understand the major components of credentialing and privileging which include primary source verification, scope of practice, and performance monitoring, and how they align with HRSA and accreditation standards. I understand privileging rights, with standing orders, can be used to streamline workflows.</p>
	<p>I ensure our credentialing and privileging processes are consistently implemented and well-documented across all provider types so each care team member can work at the top of their licensure. I actively monitor timelines for initial and re-credentialing, support audits and HRSA Operational Site Visits, and coordinate with clinical, HR, and compliance teams to address issues proactively.</p>
	<p>I collaborate with care teams to evaluate and strengthen credentialing and privileging workflows. I support the use of internal audits and performance data to identify and close compliance gaps. I ensure privileging decisions reflect clinical competency and scope of practice, and that systems are in place to monitor provider performance and service delivery after privileging.</p>
	<p>I inspire quality, accountability and innovation, while ensuring credentialing and privileging systems are not only compliant, but streamlined, scalable, and aligned with organizational goals. I work closely with clinical leaders to guide policy updates and prepare for regulatory changes. I mentor leaders in how to use credentialing data and expanded privileging to inform broader workforce and quality improvement strategies.</p>






Health Center Program Compliance

Ensure that the health center meets all legal, financial, regulatory, and funding obligations including HRSA Health Center Program and Site Visit requirements through systems of accountability, risk monitoring, continuous improvement, and transparent leadership that builds public trust.

LEVEL	SKILLS/TASKS
	<p>I am aware of the importance of complying with all legal, regulatory, and funding requirements including those from HRSA and how they relate to our health center's governance, finance, and operations. I collaborate with relevant teams including IT and compliance to learn more about monitoring systems and documentation.</p>
	<p>I can describe key compliance requirements from HRSA, state and federal regulators, and funding agencies. I understand organizational policies and can interpret them in context. I assist with audit preparation, annual HRSA Needs Assessment, and reporting processes. I help implement corrective action plans and ensure practices, such as sliding fee and value-based care protocols, are followed.</p>
	<p>I ensure our policies, procedures, and systems align with HRSA compliance elements and grant conditions. I support staff in preparing for Operational Site Visits (OSVs), Needs Assessment responses, and ensure compliance is documented. I support staff in maintaining readiness through internal monitoring and reporting practices. I contribute to corrective actions as needed.</p>
	<p>I embed compliance into daily operations across departments. I apply risk-based approaches to prioritize audits, collaborate on mock site visits, and internal monitoring activities. I train department leaders on compliance responsibilities, work with the Compliance Officer to ensure alignment with external requirements and use HRSA Needs Assessment findings to improve systems and close gaps.</p>
	<p>I champion a culture of accountability at every level of the organization. I ensure governance structures support transparent oversight and integrate compliance actions, strategically, into risk management and long-term planning. I serve as a key advisor to the board, support external partnerships and audits, and share best practices within networks to protect public trust, maintain eligibility, and uphold health center integrity as an Employer/Provider/Partner of Choice (EPPoC).</p>






Quality Improvement/Management

Ensure quality is embedded in strategic decisions and organizational doctrine, consistent with national frameworks such as value-based care. Coordinate efforts to refine quality improvement strategies for better patient outcomes, patient and staff experiences, access, and costs.

LEVEL	SKILLS/TASKS
	<p>I am obtaining resources and training to understand the basics of quality improvement (QI) workflows, plans, and terminology. I actively seek ways to support or participate in current QI initiatives.</p>
	<p>I understand the components of a Quality Management Plan and how our health center's plan connects to care delivery, performance measurement, and compliance. I am familiar with common QI frameworks, the Quintuple Aim, and the potential for "initiative fatigue." I recognize the link between non-clinical factors and health outcomes.</p>
	<p>I collaborate in the development, evaluation, and refinement of QI strategies that improve care quality, patient and provider satisfaction, health care access, and income/expenses. I apply core QI tools and principles, coordinate team engagement, and promote continuous improvement. I introduce initiatives informed by internal data and patient/community needs.</p>
	<p>I strategically apply proven QI models (e.g., Lean, Six Sigma) to drive performance and innovation. I mentor staff, facilitate cross-functional collaboration, and learn from peer organizations to adopt leading practices. I ensure alignment of QI initiatives with operational, clinical, and financial priorities.</p>
	<p>I lead the organization in achieving external quality designations (e.g., PCMH, Joint Commission) and value-based payment readiness. I guide board-level decisions with QI insights, build system-level partnerships, and integrate access metrics into all QI initiatives. I position the health center as a model of excellence in quality and patient-centered care.</p>






Quintuple Aim

Lead with a commitment to integrate and maintain quality improvement efforts that drive better health outcomes, improved patient experiences, improved staff experiences, greater access, and lower costs (the Quintuple Aim). These areas of improvement are often linked to value-based care.

LEVEL	SKILLS/TASKS
	<p>I seek resources, like NACHC's Value Transformation Framework, to build foundational knowledge of the Quintuple Aim. I obtain resources and materials to learn about the clinical and non-clinical influences on healthcare outcomes. I review the progress of programs and workflows to identify possible opportunities for Quintuple Aim improvements.</p>
	<p>I support efforts that embed patient-centered, value-based care principles into the health center's policies and team operations. I interpret the impact of how organizational change can lead to Quintuple Aim improvements that can be mirrored in HRSA's dashboards. I am learning about resources I can use through NACHC's Elevate program.</p>
	<p>I participate in NACHC's Elevate program to identify tools and recommendations that support my clinical and operational teams and can lead to system-level quality improvements. I use internal and external data to identify Quintuple Aim gaps and recommend interventions that enhance patient experience, staff satisfaction, care access, and cost management. I support programs that address clinical and non-clinical impacts on health, improve utilization, and align team workflows with value-based care.</p>
	<p>I lead system-wide quality improvement strategies aligned with the Quintuple Aim and federal, state, and payer priorities. I monitor trends, engage multidisciplinary teams and refine programs based on the analysis of health disparities/care gaps, cost trends, and patient outcomes. I support scaling high-impact practices from Elevate and other best practices that reduce health care spending and improves Quintuple Aim results.</p>
	<p>I design and guide health system transformation initiatives that optimize performance across the Quintuple Aim. I encourage organization-wide quality planning, contribute to cross-sector coalitions and advance innovative, patient-centered models of care. I ensure our data systems, financial systems, staffing models, and community partnerships are aligned to achieve and sustain value-based health care delivery and drive sustainable Quintuple Aim improvements.</p>






Risk Management

Ensure the health center is proactively risk-aware and identifies, monitors, and responds to clinical, operational, legal, environmental, and financial risks. Use risk management techniques in strategic planning efforts, workforce training, and system improvements.

LEVEL	SKILLS/TASKS
	<p>I understand the importance of managing organizational risk to reduce exposure to malpractice or compliance violations. I am learning about risk stratification to improve patient care and I'm beginning to explore the role of a comprehensive Risk Management Plan for operational resilience.</p>
	<p>I can describe key Risk Management principles, including HRSA's requirements. I am familiar with our own health center's Risk Management Plan. I understand how risk identification and mitigation contribute to safer care delivery and stronger compliance across all departments.</p>
	<p>I ensure staff consistently follows our Risk Management Plan across all essential domains: clinical management, credentialing and privileging, patient communications, incident tracking, HR, quality assurance, billing, medical recordkeeping, operational resilience, etc.. I support standard protocols and foster accountability and risk-mitigation across the organization.</p>
	<p>I lead improvements to our Risk Management Plan by using data (e.g., incident reports, financial reports, patient complaints) and tools like risk stratification to proactively improve patient services and service disruptions. I help integrate risk management with quality improvement, care coordination, and operational planning.</p>
	<p>I coach leaders and staff to embed risk management into daily operations. I initiate innovative strategies to mitigate emerging risks (e.g., cyber threats, care delivery disruptions, health care gaps) and share lessons learned externally. I ensure our risk approach meets Federal Tort Claims Act, HRSA, and accrediting body standards, and is aligned with our strategic planning goals and is updated regularly.</p>

UDS Reporting






Assist or provide oversight in effectively completing and using Uniform Data System (UDS) reports.

LEVEL	SKILLS/TASKS
	<p>I am aware that UDS reporting is a federal requirement tied to funding and compliance but have not yet participated in the reporting process. I am learning how clinical, operational, and financial data contribute to UDS and recognize the importance of accuracy and timeliness.</p>
	<p>I understand the key components of UDS reports and support team members who manage data collection and entry. I ensure staff responsible for reporting are resourced appropriately and seek clarification when discrepancies or data challenges arise.</p>
	<p>I work to ensure UDS data reports are completed accurately and submitted on time. I collaborate with internal teams to align workflows or resolve data issues throughout the year. I use UDS data to guide performance monitoring and operational decisions.</p>
	<p>I improve data accuracy and UDS performance by mentoring staff, strengthening internal reporting systems, and aligning improvement efforts with key UDS indicators. I support continuous quality improvement through training, the use of dashboards, and feedback loops, and align UDS reporting to our health center's Quintuple Aim goals.</p>
	<p>I seek innovative systems, tools, and partnerships that streamline UDS reporting and improve data quality across the organization. I share best practices with other health centers, contribute to peer learning or technical assistance efforts and document improvements earned through value-based care. I advocate for stronger data infrastructure and policy alignment to improve health outcomes, Quintuple Aim achievements, and reporting capacity.</p>

Infrastructure – Health Information Technology






Data Security

Ensure all systems collecting patient data are appropriately safeguarded, and patient confidentiality is maintained per HIPAA and other relevant regulations and establish related data governance policies.

LEVEL	SKILLS/TASKS
	<p>I understand that maintaining patient confidentiality is a legal and ethical obligation. I am aware of HIPAA and other foundational data protection regulations that govern patient health information.</p>
	<p>I can explain the core principles of HIPAA, the Health Information Technology for Economic and Clinical Health (HITECH) Act, and related regulations for data security. I understand how these rules apply to the storage, transmission, and handling of patient data across the organization. I am supportive of the IT, compliance, operations, and leadership teams that create or update our health center's data security policies, approved by the board.</p>
	<p>I regularly communicate with staff and board about the importance of updated data security policies and ethics. I feel prepared to contribute the health center's response to data breaches or risk situations. I ensure protocols are followed and staff are trained to safeguard PHI (Protected Health Information).</p>
	<p>I strengthen our data security posture through interagency collaboration, risk assessment, and ongoing staff education. I stay informed of emerging technology and privacy threats and best practices, and share updated information with staff.</p>
	<p>I champion advanced, forward-looking technologies such as encryption, access control, and real-time threat detection to proactively secure patient data. I lead strategic investments in cybersecurity infrastructure and ensure data privacy is a core value embedded across all organizational systems. I advocate for greater patient data protections at the state and national level.</p>






Data-Driven Decision Making

Build data-informed decisions and plans by leveraging health information, clinical informatics, and IT infrastructure to improve quality, outcomes, access, and the cost-effectiveness of care and operations.

LEVEL	SKILLS/TASKS
	<p>I understand the fundamental principles of data management and informatics, including how IT systems and electronic health records (EHRs) support clinical, operational, and financial processes. I recognize that data and technology can improve decision-making, and I am actively learning how to interpret basic reports and dashboards to support our goals. I appreciate the value of setting reasonable benchmarks to assess improvement.</p>
	<p>I can interpret performance data from key sources (e.g., Uniform Data System (UDS), patient satisfaction, financial reports) and understand how informatics and benchmarking support quality, efficiency, and access. I identify gaps in how data is collected, accessed, and used across departments. I promote the adoption of consistent reporting, governance, and data entry practices. I often use data to shape strategic conversations, drive change, and to understand the value of clinical decision support systems.</p>
	<p>I regularly use data to inform strategic decisions around staffing, clinical priorities, investments, and quality improvement. I collaborate across departments to ensure informatics tools and IT systems align with health center goals. I establish systems and roles that support accurate reporting and regulatory compliance, and I ensure benchmarking data guides our performance improvement efforts. I support the use of EHR and other technologies to streamline workflows and improve care coordination.</p>
	<p>I fund and encourage data-informed initiatives that span clinical, operational, and financial domains. I strive to improve the data infrastructure supports population health management, value-based care, and strategic growth. I foster shared accountability for data accuracy and actively engage teams in analyzing, interpreting, and acting on data for continuous improvement and innovation. I advocate for the use of advanced analytics and clinical decision support systems to drive Quintuple Aim improvements.</p>
	<p>I champion fully data-driven operations grounded in our mission, values, and strategic goals. I lead teams that use informatics to document improvements in health outcomes, access, experience, and cost. I secure funding and partnerships to expand our data and analytics capabilities and position the health center for future success. I anticipate emerging technology trends (such as AI and predictive analytics) and guide the organization's readiness to adopt innovations that enhance decision-making and performance against benchmarks across all domains.</p>






Electronic Health Records (EHRs) and Tracking Systems

Utilize advanced technology to optimize EHRs and other systems for benchmark tracking, management, clinical care, workflows, and payment functions.

LEVEL	SKILLS/TASKS
	<p>I am aware of the health center's EHR, electronic health information exchange (HIE), and data warehouse. I understand in general terms how these systems support health center operations, patient care, and reporting.</p>
	<p>I understand how the EHR and data dashboards support day-to-day health center operations and can navigate basic EHR functions to access patient data and care documentation. I recognize the value of EHR-integrated tools for quality improvement and regulatory compliance.</p>
	<p>I can use the main functions of the center's EHR system to retrieve data on clinical activities and assess workflows, when needed. I resolve operational and security challenges with the IT department and work with clinical staff to identify EHR workflow improvements. I guide staff in successfully leveraging EHR tools for patient engagement and secure communication. Teams use digital tools effectively and recognize when to seek assistance from our Health Center Controlled Network partner or HER vendor.</p>
	<p>I promote or improve the strategic use of advanced health IT, including HIEs, patient portals, and data warehouses to close care gaps and for continuous quality improvement. I empower teams to seek alternative ways to optimize EHR functionality to enable data-driven insights and process/workflow improvements across departments. I train staff in our data security policies and protocol.</p>
	<p>I champion innovation by identifying and implementing emerging technologies, such as AI and predictive analytics, to enhance individual and population health outcomes, workflow efficiency, close care gaps, and improve decision-making. I align advanced technology investments with organizational strategy and foster continuous digital transformation and safety.</p>

Interoperable Technology

Champion the use of technology and tools like telehealth, AI, and other applications to make patient care more accessible, reduce care gaps, and ensure data systems can be integrated across platforms and between partners.

LEVEL	SKILLS/TASKS
	<p>I am generally aware of how technologies such as telehealth, patient portals, electronic health records (EHRs), and artificial intelligence (AI) can be leveraged to improve access to care, but I have limited knowledge of their operational or strategic application. I am aware that digital access must be considered with quality assurance plans.</p>
	<p>I understand the foundational principles of accessible and interoperable data systems, including the strategic use of technology and digital communications to improve care. I am familiar with core concepts like digital literacy and data security, and whether our health center has related policies in place. I ensure that the way our health center invests in technology improvements takes into consideration important legal and access implications for all populations.</p>
	<p>I work with HIT, clinical, and operations teams to implement and evaluate technology solutions that enhance access to care, address care gaps, and initiate data sharing. I help define priorities for using dashboards, non-clinical needs data, and AI tools in ways that respect patient privacy and improve outcomes for marginalized populations. I support initiatives and fundraising to increase digital health literacy and access, encourage culturally responsive interfaces, and encourage data sharing with external partners like our local hospital system.</p>
	<p>I take advantage of advanced technology to streamline financial operations, quality improvement initiatives, and population health management. I collaborate with peers, payers, vendors, and policy stakeholders to ensure the health center's technology infrastructure is operating as needed to support all teams and patients. I lead efforts to improve our EHR interoperability with partner data systems like our local hospital. I monitor metrics related to technology adoption and impact. I support staff training on digital tools, data analysis, and secure funding for advanced technology.</p>
	<p>I drive innovation and promote national and regional models of accessible technology within community health centers. I help shape digital transformation and prioritize co-design with communities. I mentor leaders across departments in advancing user-centered and interoperable digital care models that advance the successful use of emerging technologies in safety-net settings.</p>



Technology Proficiency






Demonstrate advanced and strategic use of digital tools, data systems, and emerging technologies to improve productivity, enhance decision-making, and drive innovation across all areas of the health center's operations and mission.

LEVEL	SKILLS/TASKS
<p style="text-align: center;">1</p>	<p>I actively seek training and guidance from colleagues or external sources to improve my comfort and capability with the digital tools used at our health center, including those related to project planning, communication, and basic data tracking.</p>
<p style="text-align: center;">2</p>	<p>I confidently use core office software such as Excel, PowerPoint, and Outlook to manage tasks, organize information, and communicate effectively. I apply basic functions such as automated reminders, data sorting, and presentation enhancements to streamline my daily work.</p>
<p style="text-align: center;">3</p>	<p>I coach others in the use of digital tools to help improve their workflow and decision-making. I leverage database and analytics platforms to identify patterns, make informed recommendations, and support strategic planning across departments.</p>
<p><i>H</i></p> <p style="text-align: center;">4</p>	<p>I possess advanced skills in commonly used technologies, such as Excel (macros, pivot tables, formulas), PowerPoint (embedded media, dynamic visuals), and Outlook (task assignment and workflow automation). I explore and test new technologies like AI tools to improve organizational processes and enhance cross-functional coordination.</p>
<p style="text-align: center;">5</p>	<p>I collaborate on new approaches to using technology that transform the way our health center makes decisions, delivers care, and measures performance. I champion investments in AI and emerging digital solutions to improve operational efficiency, workforce productivity, patient outcomes, and provider satisfaction across the organization.</p>

H

Telehealth and Virtual Care






Facilitate opportunities for telehealth and virtual care programs that improve access to patient care with consideration for technology capabilities and the full range of clinical and non-clinical services.

LEVEL	SKILLS/TASKS
 <p>1</p>	<p>I understand the fundamentals of telehealth and virtual care including technologies and regulatory context. I am acquiring knowledge about telehealth operations, reimbursement, and patient privacy rules under HIPAA.</p>
 <p>2</p>	<p>I can evaluate organizational, operational, and clinical capacities to launch or expand our telehealth and virtual care services. I understand the business case for telehealth and virtual care, and how they align with our access goals. I seek input from clinical, IT, and compliance staff to identify technology partners, platform options, and staffing models.</p>
 <p>3</p>	<p>I support the selection and integration of telehealth and virtual care platforms with our EHR and data systems. I help secure funding or reimbursement mechanisms. I coordinate staff training and ensure patients are supported in accessing and using remote services. I monitor early implementation metrics such as volume, access, quality, and satisfaction.</p>
 <p>4</p>	<p>I use data to assess the impact of telehealth and virtual care on patient outcomes, care gaps, cost efficiency, and population health. I evaluate opportunities to integrate telehealth into chronic disease management and value-based care goals, and virtual care in reducing call center volume. I refine operational protocols, quality monitoring, and technology based on performance data and patient feedback.</p>
 <p>5</p>	<p>I seek partnerships, pilots, and funding to advance our models of telehealth and virtual care, including remote patient monitoring, AI-assisted outreach or triage, independent scheduling, and integrated care. I advocate for supportive policies and reimbursement at the state or national level. I take steps to expand access by addressing broadband and language needs. I work with our board to make virtual care a sustainable, integrated part of the health center's strategic plan.</p>

Infrastructure – Payment






Fundraising

Lead or contribute to the development of mission-aligned fundraising strategies (grants, donor cultivation, philanthropic partnerships, and community support) in ways that sustain and expand health center operations, innovation, and impact.

LEVEL	SKILLS/TASKS
 <p>1</p>	<p>I understand the importance of diversified fundraising—including public and private grants, donor support, and philanthropic partnerships—for sustaining and growing our health center. I am aware of how grants and donations align with our mission and contribute to program success.</p>
 <p>2</p>	<p>I understand basic principles of grant writing (for private and Federal grants), donor communications, and fundraising strategy. I can identify the typical components of successful health center proposals and donor outreach efforts. I support HRSA grant compliance and reporting for awarded grants and maintain relationships with donors.</p>
 <p>3</p>	<p>I collaborate with program, finance, and development staff to shape compelling grant proposals and philanthropic appeals that reflect our strategic goals. I help identify and pursue new funding opportunities—including grants, sponsorships, and individual donors—and support efforts to cultivate funder and donor relationships. I ensure reporting is timely, accurate, and responsive to funder expectations.</p>
 <p>4</p>	<p>I actively pursue new fundraising initiatives, grant proposal development, donor engagement strategies, and community partnership building. I use a clear processes for cross-functional coordination, quality control, and deadline management. I strengthen relationships with key funders, philanthropic partners, and donors, and initiate strategies that support recurring and multi-year funding.</p>
 <p>5</p>	<p>I am a skilled strategic leader for organization-wide fundraising aligned with long-term goals and community impact. I mentor others in grant writing, donor cultivation, and funder relationship management. I ensure fundraising communications and proposals reflect our mission, equity commitments, and vision for growth. I lead efforts to expand our funding base and secure sustained investment from diverse, values-aligned sources.</p>






Reimbursement Mechanisms

Ensure teams are equipped to optimize different payment models (fee-for-service (FFS), Prospective Payment System (PPS), value-based care (VBC), bundled payments, and capitation) and reimbursement efforts are aligned to serve medically hard-to-reach populations.

LEVEL	SKILLS/TASKS
	<p>I am aware of the core reimbursement mechanisms relevant to health centers, including the Prospective Payment System (PPS) for Medicaid and Medicare, fee-for-service, and value-based payment models. I seek to understand the relationship between service delivery and financial sustainability.</p>
	<p>I understand how our health center can bill public (Medicaid, Medicare) and private payer systems for reimbursement through risk-sharing arrangements, capitated payments, and bundled payment models. I recognize the impact of accurate documentation, coding, and quality performance on reimbursement levels.</p>
	<p>I collaborate with finance, operations, and clinical leadership to ensure staff streamline and utilize all reimbursement mechanisms related to health center operations. I help link staff roles particularly around care coordination, quality reporting, and coding accuracy to reimbursement outcomes. I promote cross-departmental awareness of how payment structures align with care delivery goals.</p>
	<p>I serve as an internal resource and strategic advisor on reimbursement to department leads and cross-functional teams. I interpret payer contract terms, align clinical quality improvement initiatives with payment incentives, and support efforts to optimize revenue cycle operations. I stay informed on Medicaid waiver programs, ACO participation, and state value-based payment (VBP) models that impact FQHC reimbursement.</p>
	<p>I implement innovative approaches to maximize reimbursement and strategic partnerships (e.g., ACOs, payor-provider collaborations) to support the health center's mission and sustainability. I represent the health center in state and national policy discussions around payment reform. I ensure reimbursement strategies are tightly aligned with organizational goals.</p>

Pharmacy Operations






Provide strategic and operational leadership to ensure the health center leverages the ability to successfully operate a health center pharmacy, including the use of 340B Drug Pricing, while building or strengthening a pharmacy program that advances clinical and financial goals.

LEVEL	SKILLS/TASKS
	<p>I am aware that a health center pharmacy has strategic clinical and financial benefits for the health center community. I'm aware of the 340B Drug Pricing Program and recognize its potential value, but I do not yet understand its components, compliance obligations, or operational impact. I seek training in how to build or improve pharmacy operations for our health center community.</p>
	<p>I understand the core elements of a health center pharmacy program and the 340B Drug Pricing Program, including eligibility criteria, covered entities, patient definition, and compliance requirements. I stay informed about regulatory changes and help ensure the health center follows best practices. I am supportive of the pharmacy team or seek to build a team for pharmacy operations.</p>
	<p>I implement or strengthen our existing health center pharmacy program and its compliance with the 340B Drug Pricing Program. I collaborate across departments to align pharmacy operations with patient access goals, fiscal accountability, and HRSA requirements.</p>
	<p>I mentor staff and inform board members about the strategic value and compliance responsibilities for the health center pharmacy in alignment with the 340B program. I troubleshoot implementation obstacles and help integrate pharmacy services more fully into the center's care delivery model.</p>
	<p>I build strategic partnerships—such as with contract pharmacies, manufacturers, or regional networks—to enhance pharmacy access, revenue, and care coordination. I identify and implement innovative strategies to sustain and expand the value of the 340B program while maintaining full compliance.</p>

Infrastructure – Cost






Capital Budget

Collaborate with finance and operational leaders to plan, project, and manage long-term capital investments that align with strategic goals, service delivery needs, and available funding streams.

LEVEL	SKILLS/TASKS
	<p>I demonstrate a foundational understanding of grant-based and capital budgets. I participate in budget discussions and have begun to collaborate with internal departments to understand facility, equipment, staffing, and infrastructure needs. I will seek training as needed.</p>
	<p>I am actively building my skills in capital budgeting and multi-year investment analysis across departments, clinics, and programs. I know how to construct a capital budget roadmap, project patient service revenue by payer mix and visit volume and connect capital needs to strategic goals.</p>
	<p>I actively lead capital budgeting processes in partnership with finance, operations, and facilities teams. I ensure capital priorities are justified by data and aligned with growth projections, quality improvement goals, and care model evolution. I support departments in evaluating ROI and the sustainability of proposed capital purchases or construction.</p>
	<p>I translate operational and clinical strategies into capital investment plans that reflect sound financial modeling. I seek stakeholder input and ensure compliance with grant/funding requirements. I oversee the development of business cases for capital projects with consideration for procurement and depreciation.</p>
	<p>I drive long-term capital planning with a unified vision for the enterprise, considering strategic expansion, infrastructure upgrades, and funding diversification. I provide leadership in forecasting and securing capital investment through public/private partnerships, philanthropy, or innovative financing models. I serve as a key advisor to the board and funders on the capital strategy for the health center sector.</p>






Generally Accepted Accounting Principles

Understand financial tools, systems, and generally accepted accounting principles (GAAP) to support the health center's operations, compliance, decision-making, and to align resources with strategic, regulatory, and fiscal priorities.

LEVEL	SKILLS/TASKS
	<p>I am learning about finance operations, policies, and procedures like the basic components and purpose of the income statement and balance sheet. I recognize these documents are vital for evaluating the financial health of the health center. I am aware of the existence of GAAP and understand that these principles guide accurate financial reporting and compliance.</p>
	<p>I understand financial concepts including revenue, expenses, assets, liabilities, and net assets. I can read and interpret basic income statements and balance sheets and support compliant reporting. I understand budgeting principles and reporting requirements tied to major funding sources like HRSA, Medicaid, and private contracts. I can explain how GAAP applies to the health center's financial operations and reporting. I am learning about supportive financial tools offered by NACHC.</p>
	<p>I manage program-level budgets and use financial reports to assess performance and make operational decisions. I collaborate in organization-wide budget planning, ensuring alignment with strategic goals. I oversee financial processes and procedures to ensure compliance with GAAP. I know when to engage internal and external expertise to ensure accuracy and consistency with accounting standards.</p>
	<p>I actively use financial tools such as performance dashboards, EHR-linked reporting, and practice management systems to identify opportunities for improvement and cost reduction. I collaborate with team members to interpret financial data and integrate it into planning, quality improvement, and compliance. I lead or oversee efforts to implement and monitor changes with GAAP, helping the finance team consistently apply these standards across operations.</p>
	<p>I align budgeting and reporting with long-term sustainability and strategic growth. I guide the health center's positioning to access new revenue sources, including value-based payment models. I communicate complex financial issues clearly to board members, funders, and partners, ensuring reports are GAAP-compliant and transparent. I stay informed on evolving accounting standards and proactively manage internal adjustments to maintain compliance and drive mission-aligned financial performance.</p>

Purchasing






Ensure strategic, cost-effective approaches to acquire, manage, and maintain supplies, equipment, and facilities in alignment with organizational goals, compliance standards, and budgetary constraints.

LEVEL	SKILLS/TASKS
 <p>1</p>	<p>I understand the scope of my role in the purchasing and budgeting process. I demonstrate basic familiarity with inventory and facility management, including the need for cost-effective purchasing practices to support day-to-day operations.</p>
 <p>2</p>	<p>I promote cost efficiency with inventory management, efficiency standards for ordering and workflows, and vendor standards that ensure accurate and efficient procurement. I understand usage trends, and identifying purchasing needs based on current inventory, operations, and clinical demands.</p>
 <p>3</p>	<p>I monitor budgets and procurement activity across departments and facilitate inventory management and safe storage. I assure staff have access to the supplies they need for efficient productivity. I support the establishment of clear guidelines for requesting and approving equipment in partnership with finance and operations teams to ensure timely, compliant, and cost-conscious purchasing aligned with budgetary goals.</p>
 <p>4</p>	<p>I am apprised of vendor performance, contract terms, and supply chain trends to enhance procurement strategies across the organization. I partner with clinical, operational, finance, and facility leaders to ensure appropriate acquisition and life-cycle management of capital equipment, and to maintain efficiency in inventory use, storage, and maintenance. I develop and implement policies and procedures in compliance with laws and regulations (like competitive bidding).</p>
 <p>5</p>	<p>I establish organization-wide strategies for purchasing that improves financial stewardship, operational sustainability, and longevity. I drive innovation in procurement processes, including digital tools, shared purchasing models, and environmentally sustainable practices. I serve as a trusted advisor on purchasing in relevant committees, associations, purchasing networks, and the board.</p>

Infrastructure – Policy

Policy Promotion






Communicate in support of policies, partnerships, and public awareness within legal and regulatory guidelines to strengthen the role of the community health center in advancing access to health care.

LEVEL	SKILLS/TASKS
	<p>I am learning how the health center fits into the broader local health system and seek guidance to understand the boundaries and value of policy promotion. I recognize the importance of building stakeholder relationships that support community health center operations and sustainability.</p>
	<p>I understand the roles that state and federal policymakers play in funding and regulating community health centers. I stay informed about opportunities to discuss the value of health center services and selectively participate in local coalitions and initiatives to expand my knowledge and network.</p>
	<p>I engage in legislative visits and public education efforts to inform policymakers and the broader community about the essential role of health centers. I help increase visibility of the center as a trusted, accessible resource invaluable resource.</p>
	<p>I actively build and nurture strategic relationships with elected officials, peer organizations, media partners, and public health agencies. I guide collaborative efforts to promote health center services, discuss Quintuple Aims, and to contribute to local initiatives that promote health access, care continuity and access.</p>
	<p>I lead innovative and sustained promotion strategies that elevate the health center’s voice and influence in policy decisions. I convene or co-lead coalitions, engage community leaders and cross-sector partners, and help shape policy agendas that advance the mission of health centers locally and nationally.</p>

Care Delivery – Population Health Management

Population Health






Lead strategic and operational efforts to improve the health of the entire population served by the health center, with attention to access, outcomes, and non-clinical drivers of health.

LEVEL	SKILLS/TASKS
	<p>I am aware of population health concepts and understand they are important. I am still developing confidence and skills to lead population-level strategies and ensure alignment between our services and the needs of our community.</p>
	<p>I understand the core principles of public and population health, including public health infrastructure, data reporting requirements, and key outcome domains (Quintuple Aim, non-clinical drivers of health). I know our health center’s most recent needs assessment findings and who our priority populations are. I can speak to relevant mandates related to population health.</p>
	<p>I incorporate population health data from community health needs assessments, UDS data, and non-clinical insights for our health center into our strategic planning. I evaluate and initiate potential partnerships that increase our ability to address population health priorities. I ensure operational plans and staffing are aligned with identified community health needs.</p>
	<p>I champion the implementation and funding for proactive strategies that close health gaps, improve outcomes, and expand access to care. I support cross-sector collaboration and establish partnerships (e.g., with public health departments, schools, housing, or food programs) to improve population health and address non-clinical drivers of health. I guide other leaders in designing services that address care gaps and social risks identified in population health data.</p>
	<p>I serve as a key driver of innovation that bridges primary care and public/population health. I identify, secure, and advocate for funds and partnerships that maintain sustainable, community-level health improvements. I influence regional or national population health efforts and share effective strategies with peers and policymakers.</p>

Care Delivery – Patient Centered Medical Home

PCMH Focus and Accreditation






Understand, promote, and lead the implementation of the Patient-Centered Medical Home (PCMH) model, and ensure proper accreditation with HRSA for high-quality, coordinated, team-based care.

LEVEL	SKILLS/TASKS
	<p>I am aware of the PCMH model and its importance for improving care quality, access, and coordination. I understand that accreditation is valuable, but I am not yet familiar with the steps to achieve or sustain recognition.</p>
	<p>I understand the principles of practice transformation and the PCMH model, including its alignment with quality improvement and value-based care. I know the key accrediting bodies (e.g., NCQA, AAAHC, TJC) and recognize the role of a strong quality infrastructure to obtain and maintain PCMH recognition.</p>
	<p>I actively support the implementation and sustainability of the PCMH model across clinical and operational areas for value-based care. I ensure that resources (staffing, time, technology) are allocated to meet and maintain accreditation standards. I reinforce PCMH principles such as team-based care, care coordination, and patient engagement through organizational policies and communication.</p>
	<p>I align the health center's strategic goals, clinical operations, and quality improvement efforts with PCMH and value-based care principles. I secure funding or technical assistance and foster cross-departmental collaboration to meet accreditation standards. I mentor clinical and operational leaders in applying the PCMH model across sites or service lines.</p>
	<p>I lead transformative initiatives that reimagine how PCMH principles can be applied to meet the needs of patients, staff, and our community. I develop partnerships that go beyond accreditation checklists to embed PCMH into the health center's long-term goals. I share outcomes from our most effective PCMH-driven innovations with peer health centers, policy makers, and funders.</p>

Care Delivery – Evidence-Based Care

Clinical Processes






Champion and support the design, implementation, and sustainability of clinical systems, processes, and workflows that ensure high-quality and efficient patient care.

LEVEL	SKILLS/TASKS
	<p>I recognize the importance of strong systems and processes that support consistent clinical care, but have limited experience in directly implementing or maintaining them.</p>
	<p>I understand the essential components of clinical operations, including patient access, scheduling models, care coordination, and the role of the practice management systems. I am familiar with the Value Transformation Framework and how clinical processes can be strengthened for value-based care. I can interpret reports related to clinical workflows and productivity and use them to inform leadership decisions.</p>
	<p>I have begun to optimize systems to improve clinical processes (e.g.: using risk stratification, care coordination, and productivity dashboards) in alignment with strategic and value-based care goals. I encourage training through the Elevate program by NACHC for value-based care. I ensure that infrastructure, staffing, and operational decisions align with the consistent delivery of high-quality care.</p>
	<p>I motivate and manage organizational improvements for clinical processes. I identify and adapt proven strategies from NACHC's Elevate program (based on the VTF) and other exceptional health centers to address care gaps at my health center. I track improvements in clinical quality, experiences, costs, and/or access (Quintuple Aim). I align operational and financial planning with evolving clinical needs.</p>
	<p>I identify and secure funds, technology, and partnerships to improve clinical processes. I leverage tools like AI and have documented Quintuple Aim improvements. I anticipate and advocate for regulatory and industry changes that impact clinical operations. I am recognized as a strategic leader who drives innovation across the health center network.</p>

Care Delivery – Non-Clinical Impacts on Health

Non-Clinical Impacts on Health






Lead and support health center strategies that address non-clinical impacts on health, including education, housing, job status, access to fresh foods, access to street drugs, etc. for whole-person care and success in value-based care.

LEVEL	SKILLS/TASKS
 <p>1</p>	<p>I am building my understanding of why both clinical and non-clinical care are critical to our health center’s mission and long-term impact. I seek learning opportunities in how unmet needs influences patient health, care utilization, and disparities.</p>
 <p>2</p>	<p>I understand the key domains of non-clinical or external drivers of health (economics, education, neighborhood and built environment, social context, and health care access) and how they relate to our patient population. I engage the board and leadership team in discussions about local risk factors and their implications for strategic plans and quality improvement.</p>
 <p>3</p>	<p>I champion the use of non-clinical data to drive decisions for quality improvement and practice transformation. I consider how organizational priorities, resources, and partnerships can support non-clinical influences on health. I ensure cross-departmental collaboration and staffing to identify sustainable strategies with support from funding partners.</p>
 <p>4</p>	<p>I ensure the health center has the infrastructure needed to collect, analyze, and act on non-clinical data as part of value-based care. I help to align non-clinical strategies with operational, financial, and clinical goals. I support the development of structured workflows to screen for and respond to external influences on health and raise funds to support these efforts.</p>
 <p>5</p>	<p>I lead cross-sector partnerships and support local, state, and national policies that address the root causes of health gaps. I integrate non-clinical influences into our value-based care and reimbursement strategy, and foster a sense of fairness, accountability, and innovation around whole-person care.</p>

Care Delivery – Care Coordination & Management

New Care Models

Lead the health center through innovation and transformation to adopt care models that improve quality, access, and financial sustainability in a changing payment environment (e.g., Integrated Care Models, Team-Based Care, Value-Based Care, Alternative Payment Models, Digital Health Solutions, Proactive & Preventive Care Models, Chronic Disease Management Programs, etc.)

LEVEL	SKILLS/TASKS
	<p>I recognize clinical operations must evolve to meet new care models but feel uncertain how to successfully lead this change without disrupting the health center's workflows and productivity.</p>
	<p>I am aware of emerging trends in value-based care, team-based care, the use of new digital tools, chronic disease management models, etc. and how these may impact the future of our health center and the ways we care for patients. I understand adopting new care models also requires thoughtful change management to adapt the organizational doctrine and forward-looking strategic plans.</p>
	<p>I have taken steps to adopt new care models and have developed a strategic plan to slowly roll-out and implement new model chosen by our leadership, staff, and board. I can clearly communicate the rationale and benefits of transitioning to a new care model, and support redesigning roles, workflows, and structures to align with reimbursement needs and Quintuple Aim goals. I help teams shift mindsets and foster adaptability across departments.</p>
	<p>I am a strong advocate for new models of care that improve the Quintuple Aim. I lead innovation sessions with my staff and board to anticipate how payment reform, new quality metrics, or AI tools will influence care model redesign. I engage cross-functional teams to co-create solutions, (e.g.: hybrid care pathways, risk stratification, AI-enhanced patient outreach or workflows, new partnerships). I lead the organization through uncertainty and transformation.</p>
	<p>I champion bold, future-focused strategies that challenge the status quo and have implemented new care models (e.g.: AI to optimize care, population health programs tailored to clinical and non-clinical risk data, alternate payment models, multi-sector pilots for value-based care, etc.). I encourage innovation and sustainability. I work with partners to influence policy by sharing successful models and lessons learned. I anticipate market and regulatory shifts and position the organization to thrive in a rapidly evolving care delivery landscape.</p>

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