

he American College of Healthcare Executives'

Healthcare Executive Competencies Assessment Tool is
offered as an instrument for healthcare leaders to use
in assessing their expertise in critical areas of healthcare
management.

How to Use This Tool

This tool can be used in several different ways to identify areas of strength and areas that may need professional skill development as well as formulating a development plan. Some examples of how this tool can be used are listed below.

- Self or organizational assessment. The tool is designed to help you identify strengths and areas for development in relation to ACHE's competencies. It may provide valuable information in your performance planning and review.
- *Team or group development.* The tool may help link individual performance to the goals of the organization. Integrating knowledge and skills needed for effective leadership will allow team members to achieve corporate goals, objectives and values.
- Employee selection or job descriptions. The tool may provide the ability to look beyond the individual and understand the composition of the entire workforce by exploring the strengths, weaknesses and gaps across the organization. You can make more informed decisions regarding training initiatives, allocate resources more effectively and align development opportunities with organizational goals.
- Academic or professional development programs. The tool
 may help uncover knowledge and skills you may wish to
 update or improve. Once you have completed the ratings,
 you will get results that point to the competencies you
 should focus on when choosing professional development
 opportunities.

This tool is self-scored with no right or wrong answers. Use the results to make a development plan, and complete the *ACHE Competencies Assessment Tool* at desired intervals to measure growth over time.

To assess expertise in the five domains of this tool, consider where you, the person, or the team you are assessing would fall on the scale of skill acquisition.

• *Novice (1)*—An individual's primary focus is understanding and gaining information in order to comprehend the skills needed. You have the level of experience gained in a classroom setting or on-the-job training. You are expected to need help when performing this skill.

- *Competent (3)*—People with considerable experience develop competence in solving problems within the learned guidelines and rules. You are able to successfully complete the competency as requested. Help from experts may be required from time to time, but you can usually perform the skill independently.
- Expert (5)—Experts work intuitively analyzing, recognizing patterns, critiquing and solving problems with ideas and expertise. You are known as the expert in this area. You can provide guidance, troubleshoot and answer questions related to this competency.

For your convenience, a complete list of ACHE resources, including readings, programs, assessments, and self-study courses are included in the back of the directory and referenced by number in each section of the assessment.

About This Tool

The competencies are derived from job analysis surveys of healthcare leaders across various management and administration disciplines. They are aligned with the challenges and opportunities experienced by leaders today. The tool is reviewed and updated annually.

Within the ACHE Healthcare Executive Competencies
Assessment Tool, the competencies are categorized into five
critical domains: Communication and Relationship
Management, Leadership, Professionalism, Knowledge of the
Healthcare Environment and Business Skills and Knowledge.
The definitions for the domains are as follows:



*derived from HLA Model

1. Communication and Relationship Management

The ability to communicate clearly and concisely with internal and external customers, establish and maintain relationships and facilitate constructive interactions with individuals and groups. This domain includes:

- A. Relationship Management
- B. Communication Skills
- C. Facilitation and Negotiation

2. Leadership

The ability to inspire individual and organizational excellence, create a shared vision and successfully manage change to attain the organization's strategic ends and successful performance. Leadership intersects with each of the other four domains. This domain includes:

- A. Leadership Skills and Behavior
- B. Organizational Climate and Culture
- C. Communicating Vision
- D. Managing Change

3. Professionalism

The ability to align personal and organizational conduct with ethical and professional standards that include a responsibility to the patient and community, a service orientation, and a commitment to lifelong learning and improvement. This domain includes:

- A. Personal and Professional Accountability
- B. Professional Development and Lifelong Learning
- C. Contributions to the Community and Profession

4. Knowledge of the Healthcare Environment

The understanding of the healthcare system and the environment in which healthcare managers and providers function. This domain includes:

- A. Healthcare Systems and Organizations
- B. Healthcare Personnel
- C. The Patient's Perspective
- D. The Community and the Environment

5. Business Skills and Knowledge

The ability to apply business principles, including systems thinking, to the healthcare environment. This domain includes:

- A. General Management
- B. Financial Management
- C. Human Resource Management
- D. Organizational Dynamics and Governance
- E. Strategic Planning and Marketing
- F. Information Management
- G. Risk Management
- H. Quality Improvement
- I. Patient Safety

Healthcare leaders should demonstrate competence in aspects of all five of these domain areas. As you work your way through the *ACHE Competencies Assessment Tool*, we hope you will find it valuable and that it provides guidance along your path of lifelong professional education as you face the ongoing challenges of management and leadership. We have made it available as a PDF file at **ache.org/ CareerResources** and hope you will share it with other healthcare leaders.

About the Competencies

The competencies were derived from job analysis surveys conducted by Healthcare Leadership Alliance associations. In addition to the American College of Healthcare Executives, members of the Healthcare Leadership Alliance are American Association of Physician Leadership, American Organization of Nurse Executives, Healthcare Financial Management Association, Healthcare Information and Management Systems Society and Medical Group Management Association.

		Novice		Competent		Expert
1.	Communication and Relationship Management					
Α.	Relationship Management					
	Organizational structure and relationships	1	2	3	4	5
	Build collaborative relationships	1	2	3	4	5
	Demonstrate effective interpersonal relations	1	2	3	4	5
	Develop and maintain medical staff relationships	1	2	3	4	5
	Develop and maintain supplier relationships	1	2	3	4	5
	Identify stakeholder needs/expectations	1	2	3	4	5
	Provide internal customer service	1	2	3	4	5
	Practice and value shared decision making	1	2	3	4	5
	Other professional norms and standards of behaviors as defined by professions such as AHA, physician's oaths and other professional pledges	1	2	3	4	5
	Creating an ethical culture in an organization	1	2	3	4	5

Readings: 3, 4, 11, 18, 21, 23, 33, 36, 61, 63, 70, 77, 88, 90, 93, 97, 110, 118, 123

Programs: 6, 14, 24, 29, 54, 62, 65, 84 Leadership Assessments: 4, 5, 6 Self-Study Courses: 2, 3, 18

B. Communication Skills

Public relations	1	2	3	4	5
Principles of communication and their specific applications	1	2	3	4	5
Sensitivity to what is correct behavior when communicating with diverse cultures, internal and external	1	2	3	4	5
Communicate organizational mission, vision, objectives and priorities	1	2	3	4	5
Identify and use human and technical resources to develop and deliver communications	1	2	3	4	5
Prepare and deliver business communications, including meeting agendas, presentations, business reports and project communications plans	1	2	3	4	5
Present results of data analysis to decision makers	1	2	3	4	5
Provide and receive constructive feedback	1	2	3	4	5
Use factual data to produce and deliver credible and understandable reports	1	2	3	4	5

Readings: 11, 21, 23, 25, 59, 75, 90 Programs: 19, 22, 45, 54, 61

Leadership Assessments: 5, 6

	COMPETENCY LEVEL					
E. Facilitation and Negotiation	Novice		Competent		Expert	
Mediation, negotiation and dispute resolution techniques	1	2	3	4	5	
Team building techniques	1	2	3	4	5	
Labor relations strategies	1	2	3	4	5	
Build effective physician and administrator leadership teams	1	2	3	4	5	
Create, participate in and lead teams	1	2	3	4	5	
Facilitate conflict and alternative dispute resolution	1	2	3	4	5	
Facilitate group dynamics, process, meetings and discussions	1	2	3	4	5	

Readings: 3, 4, 11, 22, 30, 31, 38, 72, 77, 88, 91, 106, 109, 116, 118, 123

Programs: 24, 72

Leadership Assessments: 3, 5, 6 Self-Study Courses: 2, 18, 23

LOMMUNICATION AND RELATIONSHIP MANAGEMENT DEVELOPMENT PLAN

		EVEL	L		
2. LEADERSHIP	Novice		Competent		Expert
Z. LEADERSHIP					
A. Leadership Skills and Behavior					
Leadership styles/techniques	1	2	3	4	5
Leadership theory and situational applications	1	2	3	4	5
Potential impacts and consequences of decision making in situations both internal and external	1	2	3	4	5
Adhere to legal and regulatory standards	1	2	3	4	5
Champion solutions and encourage decision making	1	2	3	4	5
Develop external relationships	1	2	3	4	5
Collaborative techniques for engaging and working with physicians	1	2	3	4	5
Incorporate and apply management techniques and theories into leadership activities	1	2	3	4	5
Foster an environment of mutual trust	1	2	3	4	5
Support and mentor high-potential talent within the organization	1	2	3	4	5
Advocate and participate in healthcare policy initiatives	1	2	3	4	5

Readings: 3, 4, 6, 16, 19, 22, 23, 38, 39, 41, 54, 57, 59, 61, 63, 75, 79, 84, 86, 87, 89, 90, 93, 115, 116

Programs: 1, 7, 10, 11, 23, 27, 31, 32, 35, 39, 42, 49, 54, 56, 57, 59, 60, 69, 71, 76, 79

Leadership Assessments: 2, 5, 6, 90 Self-Study Courses: 1, 3, 5, 7, 13

B. Organizational Climate and Culture

Create an organizational climate that encourages teamwork	1	2	3	4	5
Create an organizational culture that values and supports diversity	1	2	3	4	5
Knowledge of own and others' cultural norms	1	2	3	4	5
Assess the organization, including corporate values and culture, business processes and impact of systems on operations	1	2	3	4	5

Readings: 21, 23, 33, 40, 49, 61, 86, 91, 96, 103, 110, 116

Programs: 1, 5, 8, 21, 25, 28, 66, 73, 76, 89, 92

Leadership Assessments: 6

Other: 3

C. Communicating Vision

Establish a compelling organizational vision and goals	1	2	3	4	5
Create an organizational climate that facilitates individual motivation	1	2	3	4	5

	Novice Competent		t	Expert	
Encourage a high level of commitment to the purpose and values of the organization	1	2	3	4	5
Hold self and others accountable for organizational goal attainment	1	2	3	4	5
Gain physician buy-in to accept risk and support new business ventures	1	2	3	4	5

Readings: 4, 22, 23, 38, 77, 86, 88, 89, 91, 93, 116, 123, 135

Programs: 19, 28, 30, 63 Leadership Assessments: 6 Self-Study Courses: 1, 13

D. Managing Change

Promote and manage change	1	2	3	4	5
Explore opportunities for the growth and development of the organization on a continuous basis	1	2	3	4	5
Promote continuous organizational learning/improvement	1	2	3	4	5
Anticipate and plan strategies for overcoming obstacles	1	2	3	4	5
Anticipate the need for resources to carry out initiatives	1	2	3	4	5
Develop effective medical staff relationships in support of the organization's mission, vision and strategic plan	1	2	3	4	5

Readings: 1, 2, 3, 6, 11, 18, 21, 22, 23, 26, 37, 38, 42, 61, 65, 70, 77, 86, 88, 89, 91, 93, 96, 109, 110, 112, 118, 123

Programs: 10, 38, 40, 52, 53, 54, 57, 58, 59, 71, 74, 83, 88

Leadership Assessments: 2, 4 Self-Study Courses: 2, 13, 18

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Readings: 35, 36, 38, 70, 88, 90, 99, 100, 101, 102, 131

Programs: 49, 53, 88 Other: 1, 2, 4, 5, 6, 8

B. Professional Development and Lifelong Learning

Professional norms and behaviors	1	2	3	4	5
Professional societies and memberships	1	2	3	4	5
Contribute to professional knowledge and evidence	1	2	3	4	5
Time and stress management techniques	1	2	3	4	5
Conduct self-assessments	1	2	3	4	5
Network with colleagues	1	2	3	4	5
Participate in continuing education and career planning	1	2	3	4	5
Acquire and stay current with the professional body of knowledge	1	2	3	4	5

Readings: 13, 28, 38, 53, 59, 75, 90, 103, 129, 131, 136

Programs: 13, 18, 20, 32, 48, 50, 56, 62, 63, 70

Leadership Assessments: 1, 5, 7

Self-Study Course: 5

	COMPETENCY LEVEL					
		Novice Competent			Expert	
Contributions to the Community and Profession						
Ethical implications of human subject research	1	2	3	4	5	
Serve as the ethical guide for the organization	1	2	3	4	5	
Practice due diligence to carry out fiduciary responsibilities	1	2	3	4	5	
Mentor, advise and coach	1	2	3	4	5	
Advocate for patients, families and communities	1	2	3	4	5	
Advocate with physicians for the importance of hiring professionally trained and certified administrators and supporting their professiona						
development	1	2	3	4	5	
Participate in community service	1	2	3	4	5	

Readings: 2, 21, 54, 61, 78

Programs: 17

Self-Study Courses: 1, 7

Other: 7, 8

PROFESSIONALISM DEVELOPMENT PLAN

		COMPETENCY LEVEL						
4.	KNOWLEDGE OF THE HEALTHCARE ENVIRONMENT	Novice	Competent			Expert		
Α.	Healthcare Systems and Organizations							
	Healthcare and medical terminology	1	2	3	4	5		
	Managed care models, structures and environment	1	2	3	4	5		
	The interdependency, integration and competition among healthcare sector	rs 1	2	3	4	5		
	Levels of healthcare along the continuum of care	1	2	3	4	5		
	Levels of service from a business perspective	1	2	3	4	5		
	Evidence-based management practice	1	2	3	4	5		
	Healthcare economics	1	2	3	4	5		
	Requirements for nonprofit healthcare organizations	1	2	3	4	5		
	The interrelationships among access, quality, cost, resource allocation, accountability and community	1	2	3	4	5		
	adings: 1, 5, 20, 21, 22, 24, 25, 33, 37, 58, 61, 66, 67, 68, 107, 114, 117, 117, 118, 119, 119, 119, 119, 119, 119, 119	133						
В.	Healthcare Personnel							
	Ancillary services	1	2	3	4	5		
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Ancillary services	1	2	3	4	5
Physician roles	1	2	3	4	5
The healthcare sectors	1	2	3	4	5
Staff perspective in organizational settings	1	2	3	4	5
Nurse and allied health professionals' scope of practice	1	2	3	4	5
Support services	1	2	3	4	5
Role of nonclinical professionals in the healthcare system	1	2	3	4	5
Educational funding for healthcare personnel	1	2	3	4	5
Workforce issues	1	2	3	4	5

Readings: 21, 22, 29, 43, 63, 69, 74, 90, 92, 103, 108, 116, 119, 135

Programs: 6, 14, 29, 43, 44, 55, 65, 67, 75, 81, 89, 91, 92

Self-Study Courses: 3

C. The Patient's Perspective

The patient's perspective (e.g., cultural differences, expectations)	1	2	3	4	5
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Readings: 2, 7, 50, 112, 115

Program: 53

Self-Study Course: 12

		LEVEL			
			Competent	İ	Expert
The Community and the Environment					
Socioeconomic environment in which the organization functions	1	2	3	4	5
Healthcare trends	1	2	3	4	5
Implications of community standards of care	1	2	3	4	5
Healthcare technological research and advancements	1	2	3	4	5
Organization and delivery of healthcare	1	2	3	4	5
Community standards of care	1	2	3	4	5
Corporate compliance laws and regulations	1	2	3	4	5
Regulatory and administrative environment in which the					
organization functions	1	2	3	4	5
Governmental, regulatory, professional and accreditation agencies	1	2	3	4	5
Legislative issues and advocacy	1	2	3	4	5

Readings: 1, 15, 36, 45, 50, 51, 61, 73, 84, 87, 98, 114, 135

Programs: 9, 13, 16, 34, 38, 34, 41, 58, 70, 74

Self-Study Course: 12

Other: 8

KNOWLEDGE OF THE HEALTHCARE ENVIRONMENT DEVELOPMENT PLAN

		LEVEL			
BUSINESS SKILLS AND KNOW! EDGE	Novice Competent				Expert
BUSINESS SKILLS AND KNOWLEDGE					
General Management					
Ability to analyze and evaluate information to support a decision or recommendation	1	2	3	4	5
Ability to distinguish relevant from irrelevant information	1	2	3	4	5
Ability to integrate information from various sources to make decisions or recommendations	1	2	3	4	5
Collect and analyze data from internal and external sources relevant to each situation	1	2	3	4	5
Basic business contracts	1	2	3	4	5
Techniques for business plan development, implementation and assessment	1	2	3	4	5
Justify a new business model or business plan	1	2	3	4	5
Principles of public affairs and community relations	1	2	3	4	5
The functions of organizational policies and procedures	1	2	3	4	5
Analyze the current way of doing business and clinical processes	1	2	3	4	5
Anticipate cause-and-effect relationships	1	2	3	4	5
Conduct needs analysis, identify and prioritize requirements	1	2	3	4	5
Define problems or opportunities	1	2	3	4	5
Distinguish between important and unimportant aspects of business and clinical situations as a basis for sound decision making	1	2	3	4	5
Identify alternate processes and potential solutions	1	2	3	4	5
Promote and apply problem-solving philosophies	1	2	3	4	5
Utilize comparative analysis strategies	1	2	3	4	5
Demonstrate critical thinking and analysis	1	2	3	4	5
Prioritize or triage as necessary to ensure critical functions are repaired, maintained or enhanced	1	2	3	4	5
Broad systems connections—potential impacts and consequences of decisions in a wide variety of situations both internal and external	1	2	3	4	5
Systems theory	1	2	3	4	5
Systems thinking	1	2	3	4	5
Champion systems thinking	1	2	3	4	5
Identify how a system design accommodates business processes	1	2	3	4	5
Seek information from a variety of sources	1	2	3	4	5

5.

A.

	COMPETENCY LEVEL				
	Novice	ce Competent			Expert
Evidence-based practice	1	2	3	4	5
Facilities planning	1	2	3	4	5
Inventory control systems	1	2	3	4	5
Project management	1	2	3	4	5
Purchasing procurement	1	2	3	4	5
Develop work plans	1	2	3	4	5
Perform audits of systems and operations	1	2	3	4	5
Management functions	1	2	3	4	5
Assess organizational perception of systems effectiveness and					
departmental effectiveness	1	2	3	4	5
Develop requests for information and requests for proposals	1	2	3	4	5
Manage vendor contracts	1	2	3	4	5
Measure quantitative dimensions of systems and departmental effectiveness	s 1	2	3	4	5
Organize and manage the human and physical resources of the					
organization to achieve input, buy-in and optimal performance	1	2	3	4	5

Readings: 5, 14, 20, 21, 22, 23, 33, 37, 44, 61, 62, 66, 70, 74, 82, 83, 85, 90, 97, 106, 107, 110, 127, 134

Programs: 2, 23, 31, 35, 37, 48, 50, 64, 66, 69, 77, 79, 85

Leadership Assessments: 1, 5

Self-Study Courses: 4, 5, 9, 17, 19, 22

B. Financial Management

8					
Basic accounting principles	1	2	3	4	5
Financial management and analysis principles	1	2	3	4	5
Financial planning methodologies	1	2	3	4	5
Financial statements	1	2	3	4	5
Outcomes measures and management	1	2	3	4	5
Reimbursement principles, ramifications and techniques, including rate setting and contracts	1	2	3	4	5
Principles of operating, project and capital budgeting	1	2	3	4	5
Fundamental productivity measures	1	2	3	4	5
Financial controls and auditing principles	1	2	3	4	5
Revenue generation	1	2	3	4	5
Asset management, including depreciation schedule, facilities, equipment, etc.	1	2	3	4	5

	COMPETENCY LEVEL					
Analyze financial reward versus risk	Novice 1	2	Competent 3	4	Expert 5	
Apply financial planning methodologies to organizational objectives	1	2	3	4	5	
Develop accounting and financial control systems	1	2	3	4	5	
Develop and use performance monitoring metrics	1	2	3	4	5	
Develop coding and reimbursement policies and procedures	1	2	3	4	5	
Establish business relationships with financial advisors	1	2	3	4	5	
Maintain compliance with tax laws and filing procedures	1	2	3	4	5	
Negotiate third-party contracts	1	2	3	4	5	
Provide stewardship of financial resources	1	2	3	4	5	
Potential impacts and consequences of financial decision making on operations, healthcare, human resources and quality of care	1	2	3	4	5	
Financing including funding sources, the process of obtaining credit and bond ratings, and issuing bonds	1	2	3	4	5	
Philanthropy and foundation work, including source of funding for non-profit organizations or to target for-profit organizations' activities	1	2	3	4	5	
Supply chain systems, structures and processes	1	2	3	4	5	

Readings: 10, 14, 15, 17, 26, 33, 44, 46, 47, 48, 49, 52, 56, 61, 80, 96, 125

Programs: 2, 9, 36, 37, 46, 77, 82, 86, 87

Self-Study Courses: 14, 19, 21, 22

C. Human Resource Management

O .					
Human resources laws and regulations	1	2	3	4	5
Performance management systems	1	2	3	4	5
Recruitment and retention techniques	1	2	3	4	5
Staffing methodologies and productivity management	1	2	3	4	5
Employee satisfaction measurement and improvement techniques	1	2	3	4	5
Employee motivational techniques	1	2	3	4	5
Compensation and benefits practices	1	2	3	4	5
Worker safety, security and employee health issues	1	2	3	4	5
Conflict resolution and grievance procedures	1	2	3	4	5
Organizational policies and procedures and their functions	1	2	3	4	5
The need for and/or desirability of outsourcing	1	2	3	4	5
The varying work environments in which staff work	1	2	3	4	5

	COMPETENCY LEVEL				
	Novice		Competent		Expert
Define staff roles, responsibilities and job descriptions	1	2	3	4	5
Manage departmental personnel processes, including performance appraisals; incentives; staff recruitment, selection and retention; training and education; coaching and mentoring	1	2	3	4	5
Job classification systems	1	2	3	4	5
Develop and implement policies and procedures with physicians to address physician behavioral and burnout issues	1	2	3	4	5
Develop and manage employee performance management systems	1	2	3	4	5
Develop effective physician recruitment and retention programs	1	2	3	4	5
Develop employee benefit and assistance plans	1	2	3	4	5
Engage in workforce planning	1	2	3	4	5
Evaluate and manage employee efficiency and productivity	1	2	3	4	5
Potential impacts and consequences of human resources	1	2	3	4	5
Decision making on operations, finances, healthcare and quality of care	1	2	3	4	5
Selection techniques, including commonly available assessments and relative benefits	1	2	3	4	5
Labor relations practices and strategies	1	2	3	4	5
Job design processes	1	2	3	4	5
Succession planning models	1	2	3	4	5

Readings: 5, 11, 22, 29, 33, 43, 44, 54, 55, 72, 74, 90, 99, 118

Programs: 43, 44, 55, 67, 68, 73 Self-Study Courses: 1, 7, 18

D. Organizational Dynamics and Governance

Organization systems theories and structures	1	2	3	4	5
How an organization's culture impacts its effectiveness	1	2	3	4	5
Governance theory	1	2	3	4	5
Governance structure	1	2	3	4	5
Medical staff structure and its relationship to the governing body and facility operation	1	2	3	4	5
Public policy matters and legislative and advocacy processes	1	2	3	4	5
Organizational dynamics, political realities and culture	1	2	3	4	5
Principles and practices of management and organizational behavior	1	2	3	4	5
Build trust and cooperation between/among stakeholders	1	2	3	4	5

	COMPETENCY LEVEL				
Construct and maintain governance systems	Novice 1	2	Competent 3	4	Expert 5
Document and implement policies and procedures	1	2	3	4	5
Evaluate and improve governing bylaws, policies and processes	1	2	3	4	5
Facilitate physician understanding and acceptance of good business management	1	2	3	4	5
Manage the performance of subsystems in a manner that optimizes the whole synergy	1	2	3	4	5
Interpret and integrate federal, state and local laws and regulation	1	2	3	4	5

Readings: 3, 21, 22, 29, 32, 38, 44, 57, 61, 95, 105, 109, 111, 118, 134

Programs: 4, 7, 81

Other: 8

E. Strategic Planning and Marketing

Business plan development and implementation process	1	2	3	4	5
Business planning, including business case and exit-strategy development	1	2	3	4	5
Evaluate whether a proposed solution aligns with the organizational business plan	1	2	3	4	5
Marketing principles and tools	1	2	3	4	5
Marketing plan development	1	2	3	4	5
Manage projects and/or resources	1	2	3	4	5
Healthcare system services	1	2	3	4	5
Implementation planning	1	2	3	4	5
Crisis and disaster planning	1	2	3	4	5
Characteristics of strategic decision support	1	2	3	4	5
Strategic planning processes development and implementation	1	2	3	4	5
Develop and monitor departmental strategic and tactical objectives	1	2	3	4	5
Develop a benefits realization model that measures product or service performance to ensure that strategic goals are met	1	2	3	4	5
Organizational mission, vision, objectives and priorities	1	2	3	4	5
Plan for business continuance in the face of potential disasters that could disrupt service delivery	1	2	3	4	5
Pursuing and establishing partnerships and strategic alliances	1	2	3	4	5

Readings: 34, 42, 44, 56, 60, 61, 65, 72, 95, 104, 107, 114, 116, 125, 127, 128, 132

Programs: 8, 25, 26, 34, 83, 87, 90 Self-Study Courses: 8, 10, 11, 16

	COMPETENCY LEVEL				
	Novice	Competent			Expert
Information Management					
Application software	1	2	3	4	5
Characteristics of administrative systems/programs	1	2	3	4	5
Characteristics of clinical systems/programs	1	2	3	4	5
Confidentiality principles and laws	1	2	3	4	5
Data analysis, including manipulation, understanding of and ability to explain data	1	2	3	4	5
Electronic education and information resources and systems	1	2	3	4	5
Health informatics	1	2	3	4	5
Information systems planning and implementation	1	2	3	4	5
Technology trends and clinical applications	1	2	3	4	5
Principles of database and file management	1	2	3	4	5
Technology privacy, confidentiality and security requirements	1	2	3	4	5
Role and function of information technology in operations	1	2	3	4	5
Testing and evaluation activities of IT systems	1	2	3	4	5
Information systems continuity	1	2	3	4	5
Analyze problem reports for trends	1	2	3	4	5
Conduct demonstrations, evaluate and select healthcare IT systems	1	2	3	4	5
Ensure accuracy and integrity of data	1	2	3	4	5
Compatibility of software, hardware and network components to facilitate business operations	1	2	3	4	5
Ensure staff members are trained to use information systems	1	2	3	4	5
Evaluate results of a system security/privacy effectiveness assessment	1	2	3	4	5
Integrate IT systems that support decision making	1	2	3	4	5
Link the IT plan to the business plan	1	2	3	4	5
Monitor IT systems' sustainability, reliability and maintainability	1	2	3	4	5
Monitor and adjust IT system capacity	1	2	3	4	5
Recommend policies and procedures for information management systems	i 1	2	3	4	5
Information systems continuity, including disaster planning, recovery, backup, security, sabotage and natural disasters	1	2	3	4	5

F.

	COMPETENCY LEVEL				
	Novice		Competent	t	Expert
Factors that influence selection, acquisition, and maintenance of IT systems, including upgrades and conversions, and technology lifecycles	1	2	3	4	5
Healthcare analytics	1	2	3	4	5

Readings: 12, 17, 27, 33, 37, 44, 52, 62, 77

Programs: 15, 42, 47, 86

G. Risk Management

Risk management principles and programs	1	2	3	4	5
Confidentiality principles and laws	1	2	3	4	5
Corporate compliance laws and regulations	1	2	3	4	5
Medicare/Medicaid/third-party payment regulations	1	2	3	4	5
Inspection and accrediting standards, regulations and organizations	1	2	3	4	5
Patients' rights, laws and regulations	1	2	3	4	5
Compliance with regulatory agencies and tax status requirements	1	2	3	4	5
Contingency planning	1	2	3	4	5
Corporate history and record-keeping procedures	1	2	3	4	5
Credentialing, medical malpractice and professional liability	1	2	3	4	5
Personnel and property security plans and policies	1	2	3	4	5
Professional resource networks for risk-related activities	1	2	3	4	5
Risk assessments and analyses	1	2	3	4	5
Risk mitigation	1	2	3	4	5
Risks related to personnel management	1	2	3	4	5
Risks related to quality management and patient safety	1	2	3	4	5
Conflict resolution and grievance procedures	1	2	3	4	5
Establish patient, staff and organizational confidentiality policies	1	2	3	4	5
Maintain compliance with government contractual mandates	1	2	3	4	5
Plan for business continuance in the face of potential disasters that could disrupt service delivery	1	2	3	4	5

Readings: 6, 16, 40, 74, 83, 84, 115, 121, 122

Programs: 47, 61, 68

Self-Study Courses: 4, 11, 17

	COMPETENCY LEVEL				
	Novice		Competent		Expert
Quality Improvement					
Benchmarking techniques	1	2	3	4	5
Medical staff peer review	1	2	3	4	5
Clinical methodologies	1	2	3	4	5
Utilization review and management regulations	1	2	3	4	5
Clinical pathways and disease management	1	2	3	4	5
National quality initiatives, including patient safety	1	2	3	4	5
Knowledge of tools for improving patient safety	1	2	3	4	5
Customer satisfaction principles and tools	1	2	3	4	5
Data collection, measurement and analysis tools and techniques	1	2	3	4	5
Patient communication systems	1	2	3	4	5
Quality improvement theories and frameworks	1	2	3	4	5
Quality planning and management	1	2	3	4	5
Recognition of quality as a strategic initiative	1	2	3	4	5
Training and certification	1	2	3	4	5
Develop and implement performance and process improvement programs	1	2	3	4	5
Develop and implement quality assurance and patient satisfaction programs	1	2	3	4	5
Develop clinical pathway structure and function	1	2	3	4	5

Readings: 2, 7, 8, 9, 17, 33, 40, 44, 64, 78, 81, 94, 113, 122, 124, 129

Programs: 3, 12, 33, 46, 51, 78, 80

Self-Study Courses: 6, 10

I. Patient Safety*

Establish and sustain a safety culture	1	2	3	4	5
Collaborate with public agencies and private organizations to support patient safety	1	2	3	4	5
Create a common set of safety metrics that reflect meaningful outcomes	1	2	3	4	5
Funding for research in patient safety and implementation science	1	2	3	4	5
Address patient safety across the care continuum	1	2	3	4	5

	COMPETENCY LEVEL				
	Novice	Competent			Expert
Support the healthcare workforce by providing a safe and healthy work environment to optimize safe patient care	1	2	3	4	5
Partner with patients and families for the safest care	1	2	3	4	5
Ensure that technology is secure and optimized to improve patient safety	1	2	3	4	5

^{*} These competencies were adapted from original source material from the Institute for Healthcare Improvement at www.IHI.org with its permission, ©NPSF 2015.

Readings: 40, 71, 122 Programs: 3, 33, 51 Other: 9, 10

BUSINESS SKILLS AND KNOWLEDGE DEVELOPMENT PLAN

ACHE RESOURCE LISTINGS

Readings:

- 1. Care Organizations: Your Guide to Strategy, Design, and Implementation by Marc Bard, MD, and Mike Nugent
- 2. Achieving Service Excellence: Strategies for Healthcare, Second Edition, by Myron D. Fottler, PhD; Robert C. Ford, PhD; and Cherill P. Heaton, PhD
- 3. A New Compact: Aligning Physician-Organization Expectations to Transform Patient Care by Mary Jane Kornacki, with Jack Silversin
- 4. An Insider's Guide to Physician Engagement by Andrew C. Agwunobi, MD
- 5. An Insider's Guide to Working with Healthcare Consultants by Andrew Agwunobi, MD
- 6. Anticipate, Respond, Recover: Healthcare Leadership and Catastrophic Events by K. Joanne McGlown, PhD, RN, FACHE, and Phillip D. Robinson, FACHE, editors
- 7. A Physician Guidebook to The Best Patient Experience by Bo Snyder, FACHE
- 8. Applying Quality Management in Healthcare: A Systems Approach, Fifth Edition, by Patrice L. Spath
- 9. The Best Patient Experience: Helping Physicians Improve Care, Satisfaction, and Scores by Robert M. Snyder Jr., FACHE
- 10. Best Practice Financial Management: Six Key Concepts for Healthcare Leaders, Third Edition, by Kenneth Kaufman
- 11. Better Communication for Better Care: Mastering Physician-Administrator Collaboration by Kenneth H. Cohn, MD, FACS
- 12. Big Data in Healthcare: Statistical Analysis of the Electronic Health Record by Farrokh Alemi, PhD
- 13. Boost Your Nursing Leadership Career: 50 Lessons that Drive Success by Kenneth R. White, PhD, RN, FACHE, and Dorrie Fontaine, PhD, RN
- 14. Capital Projects and Healthcare Reform: Navigating Design and Delivery in an Era of Disruption by Robert D. Levine and Georgeann B. Burns
- 15. Cases in Healthcare Finance, Seventh Edition, by George H. Pink, PhD and Paula H. Song, PhD
- 16. Contemporary Issues in Healthcare Law and Ethics, Fourth Edition, by Dean M. Harris, JD
- 17. The Core Elements of Value in Healthcare by Paveljit S. Bindra, MD
- 18. Creating the Hospital Group Practice: The Advantage of Employing or Affiliating with Physicians by Eric Lister, MD, and Todd Sagin, MD, JD
- 19. Developing Physician Leaders for Successful Clinical Integration by Carson F. Dye, FACHE, and Jacque J. Sokolov, MD
- 20. Dimensions of Long-Term Care Management: An Introduction, Second Edition, by Mary Helen McSweeney-Feld, PhD; Carol Molinari, PhD; and Reid Oetjen, PhD, editors
- 21. Diversity on the Executive Path: Wisdom and Insights for Navigating to the Highest Levels of Healthcare Leadership by Diane Dixon, EdD
- 22. Dunn and Haimann's Healthcare Management, Eleventh Edition, by Rose T. Dunn, CPA, FACHE, FHFMA
- 23. Dyad Leadership and Clinical Integration: Driving Change, Aligning Strategies by Alan Belasen, PhD
- 24. Economics for Healthcare Managers, Fourth Edition, by Robert H. Lee, PhD
- 25. The Economics of Health Reconsidered, Fifth Edition, by Thomas Rice, PhD, and Lynn Unruh, PhD, RN
- 26. Levers for High-Impact Performance Improvement: How Healthcare Organizations Can Accelerate Change and Sustain Results by Gary Auton
- 27. Electronic Health Records: Strategies for Long-Term Success by Michael Fossel, MD, and Susan Dorfman, DHA
- 28. *The Emerging Healthcare Leader: A Field Guide*, Second Edition, by Laurie K. Baedke, FACHE, FACMPE, and Natalie D. Lamberton, FACHE
- 29. Employed Physician Networks: A Guide to Building Strategic Advantage, Value, and Financial Sustainability by David W. Miller, FACHE; Terrence R. McWilliams, MD; and Travis C. Ansel
- 30. Enhanced Physician Engagement: Volume 1, What It Is, Why You Need It, and Where to Begin by Carson Dye, FACHE, editor
- 31. Enhanced Physician Engagement: Volume 2, Tools and Tactics for Success by Carson Dye, FACHE, editor
- 32. Essential Operational Components for High-Performing Healthcare Enterprises by Jon Burroughs, MD, FACHE
- 33. Essentials of Healthcare Management: Cases, Concepts, and Skills, Second Edition, by Leigh Cellucci, PhD; Michael R. Meacham, JD; and Tracy J. Farnsworth, EdD
- 34. Essentials of Strategic Planning in Healthcare, Third Edition, by Jeffrey P. Harrison, PhD, FACHE

- 35. Ethics and Professionalism for Healthcare Managers, Second Edition, by Elizabeth J. Forrestal, PhD, FAHIMA, and Leigh W. Cellucci, PhD
- 36. Evaluating the Healthcare System: Effectiveness, Efficiency, and Equity, Fourth Edition, by Charles E. Begley, David R. Lairson, Robert O. Morgan, Paul J. Rowan and Rajesh Balkrishnan, PhD
- 37. Evidence-Based Management in Healthcare: Principles, Cases and Perspectives, Second Edition, by Anthony R. Kovner, PhD, and Thomas D'Aunno, PhD, editors
- 38. Exceptional Leadership: 16 Critical Competencies for Healthcare Executives, Second Edition, by Carson F. Dye, FACHE, and Andrew N. Garman, PsyD
- 39. Executive Turned Consultant: Transitioning from Experienced to Executive to Trusted Advisor in Healthcare by Scott A. Mason, DPA, FACHE
- 40. Five Disciplines for Zero Patient Harm: How High Reliability Happens by Charles Mowll, LFACHE
- 41. Followership: A Practical Guide to Aligning Leaders and Followers by Tom Atchison, EdD
- 42. From Competition to Collaboration: How Leaders Cultivate Partnerships to Drive Value and Transform Health by Tracy L. Duberman, PhD, FACHE, and Robert H. Sachs, PhD
- 43. Fundamentals of Human Resources in Healthcare, Second Edition, by Bruce J. Fried, PhD, and Myron D. Fottler, PhD, editors
- 44. Fundamentals of Medical Practice Management by Stephen L. Wagner, PhD, FACHE, FACMPE, FACEM, FACHT
- 45. Futurescan 2022–2027: Health Care Trends and Implications, copublished with the Society for Healthcare Strategy & Market Development
- 46. Gapenski's Fundamentals of Healthcare Finance, Fourth Edition, by Kristin L. Reiter, PhD, and Paula Song, PhD
- 47. *Gapenski's Healthcare Finance: An Introduction to Accounting and Financial Management*, Seventh Edition, by Kristin L. Reiter, PhD, and Paula H. Song, PhD
- 48. Gapenski's Understanding Healthcare Financial Management, Eighth Edition, by George H. Pink, PhD, and Paula H. Song, PhD
- 49. Getting It Done: Experienced Healthcare Leaders Reveal Field-Tested Strategies for Clinical and Financial Success by Kenneth H. Cohn, MD, FACS, and Steven A. Fellows, FACHE
- 50. *The Global Healthcare Manager: Competencies, Concepts, and Skills* by Michael Counte, PhD; Bernardo Ramirez, MD; Daniel J. West Jr., PhD; FACHE, FACMPE; and William Aaronson, PhD
- 51. The Guide to Healthcare Reform: Readings and Commentary by Daniel B. McLaughlin
- 52. Healthcare Applications: A Casebook in Accounting and Financial Management by Thomas E. McKee, PhD, and Linda J. B. McKee, PhD
- 53. The Healthcare Consultant's Handbook: Career Opportunities and Best Practices by Scott A. Mason, DPA, FACHE
- 54. The Healthcare C-Suite: Leadership Development at the Top by Andrew N. Garman, PsyD, and Carson F. Dye, FACHE
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- 56. Healthcare Facility Planning: Thinking Strategically, Second Edition, by Cynthia Hayward, FA AHC
- 57. Healthcare Governance: A Guide for Effective Boards, Second Edition, by Errol L. Biggs, PhD, FACHE
- 58. Healthcare in the United States: Clinical, Financial, and Operational Dimensions by Stephen L. Walston, PhD, and Kenneth L. Johnson, PhD, FACHE
- 59. The Healthcare Leader's Guide to Actions, Awareness, and Perception, Third Edition, Carson F. Dye, FACHE, and Brett D. Lee, FACHE
- 60. Healthcare Marketing: A Case Study Approach by Leigh Cellucci, PhD; Carla Wiggins, PhD; and Tracy Farnsworth, EdD
- 61. The Healthcare Nonprofit: Keys to Effective Management by Stephen F. Gambescia, PhD; Sylvia V. Bastani; and Bruce Melgary
- 62. Healthcare Operations Management, Fourth Edition, by Daniel B. McLaughlin and John R. Olson, PhD
- 63. Healthcare Philanthropy: Advance Charitable Giving to Your Organization's Mission by Betsy Chapin Taylor
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- 135. World Health Systems: Challenges and Perspectives, Second Edition, by Bruce J. Fried, PhD, and Laura M. Gaydos, PhD, editors
- 136. Your Healthcare Job Hunt: How Your Digital Presence Can Make or Break Your Career by Donna Malvey, PhD, and Jessica Sapp, DrPH

Programs:

- 1. Guide for the Emerging Healthcare Leader
- 2. A Proven Formula for Achieving Enterprise Operational Excellence
- 3. Achieve High Reliability: Gain a Blueprint for Zero Harm Care
- 4. Achieving a Strategic Partnership with Your Board: Thrive in the Midst of Accountability
- 5. Achieving Speed, Spread, Scalability and Sustainability for Health Systems
- 6. Achieving Superior Outcomes Through Executive-Physician Partnerships
- 7. Addressing the Governance Conundrum: Building a Board that Leads and Follows
- 8. Advanced Strategic Planning to Transform Your Organization
- 9. Aggressively Improve Margin and Market Growth: 2021 National Research for C-Suite
- 10. Agility and Resilience in Healthcare Leadership: Key Behaviors for Leading Change
- 11. Aligning Operations with Employee Engagement Strategies to Drive Positive, Sustainable Outcomes
- 12. Aligning Quality Management and Health Equity to Improve Outcomes

- 13. Applying Design Thinking to Healthcare's Most Pressing Challenges
- 14. The Art and Principles of Physician Leadership and Engagement
- 15. Artificial Intelligence for Leaders: Beyond Big Data
- 16. The Basics of Grassroots Advocacy
- 17. Behavioral Health Challenges, Strategies and Solutions: The Business Case for Meeting Community Needs
- 18. Behavior Smarts: Increasing Healthcare Leadership Performance
- 19. Be the Best Part of Their Day: Supercharging Communication With Values-Driven Leadership
- 20. Board of Governors Exam Review Course
- 21. Breakthrough Physician Alignment: Creating a Win-Win for Optimizing Organizational Performance
- 22. Compelling Communication: Creating Engagement, Understanding and Results
- 23. The Courage to Lead: Critical Skills for Healthcare Leaders
- 24. Creating Successful Physician Integration and Engagement Strategies for Long Term Success
- 25. Culture: The Force Behind Strategy
- 26. Delivery Disrupted: Innovations, AI, and Staying Ahead of the Curve in Healthcare
- 27. Disruptive Innovators: Rise to the Challenge
- 28. Doing Well by Doing Good: Cultivating Mission to Improve Margin and Performance
- 29. Drive Physician Engagement Today for Aligned Leaders Tomorrow
- 30. Driving Digital Health Innovation for Maximum Impact
- 31. Effective, Credible and Accountable Leadership in the C-suite
- 32. Effective Crisis Leadership Transforming Ourselves and Our Organizations for Success
- 33. Effective Leadership for High-Reliability Healthcare
- 34. Epidemiology Meets Strategy: Leading Healthcare Organizations in a New Reality
- 35. Executive Program
- 36. Financial Turnarounds: Lessons Learned From the Frontline
- 37. Fundamental Financial Skills for Healthcare Organization Success
- 38. Growth in the Reform Era
- 39. Health System Simulation
- 40. Health Systems as Stewards of Health: A Construct for Leading Transformation
- 41. Hospitals and Health Systems of the Future: Transforming to Thrive
- 42. Human-Centered Leadership for the Next Era of Digital Healthcare Systems
- 43. Improve Clinician Retention and Patient Outcomes by Optimizing Professional Wellbeing
- 44. Improving Results through Better Team Engagement and Accountability
- 45. Improving the Patient Experience to Build Customer Loyalty
- 46. Integrating Quality and Cost in a Pay-for-Value Era
- 47. Key Financial Principles for the Nonfinancial Healthcare Executive
- 48. Leaders Conference
- 49. Leadership and Accountability in Project Management and Programs
- 50. Leadership Development Program
- 51. Leading A Culture of Safety: A New Operating Model for High Reliability Quality, Engagement, Efficiency, and Growth
- 52. Leading and Managing in Changing Times
- 53. Leading Complex Change: Emotional Awareness, Intentionality & Agility
- 54. Leadership Power Levers and Influence Tactics: The Path Toward Trustworthiness
- 55. Leading for Success: Creating a Committed Workforce
- 56. Leading from Your Upper Brain: A Neuroscience Approach to Driving Performance
- 57. Leading in Difficult Times: The Role of Leader Humility and Ambition in Improving Engagement and Innovation
- 58. Leading in a Changing Environment: Focus on Population Health
- 59. Leading Strategic Change
- 60. Leading Transformational Change
- 61. Managing Conflict, Confrontations and Disputes
- 62. Mentor, Coach, Lead to Peak Professional Performance
- 63. Never Be Boring: Present Like a Pro

- 64. Optimizing Ambulatory Management for the 21st Century
- 65. Optimizing Business and Clinical Outcomes Through Physician-Executive Collaboration
- 66. Optimizing Engagement and Performance in a Healing Ecosystem: Creating a Climate of Workforce Thriving
- 67. Optimizing the Roles of Physician Assistants and Nurse Practitioners
- 68. An Overview of Health Law: Liabilities, Compliance, and Leadership
- 69. Physician Executive Program
- 70. Possibilities, Probabilities and Creative Solutions: Breakthrough Thinking for Complex Environments
- 71. Practical Leadership Strategies in an Age of Change
- 72. Process and Technique of Negotiating
- 73. Professional Burnout in Healthcare: Lead Your Organization to Wellness
- 74. Proven Strategies and Leadership Methods for Effectively Leading Change in Today's Environment
- 75. Redesign and Operationalize Your Medical Staff for Health Reform
- 76. Resilient Leadership: The Role of Well-Being in Individual and Organizational Performance
- 77. Retooling for the Future in Healthcare Operations: The Changing Roles of Leaders
- 78. Revitalizing Your Quality Improvement Strategies
- 79. Senior Executive Program
- 80. Service Line Planning: Developing a Consumer Based Approach to Providing Quality Care
- 81. Solving the Enigma of Medical Group Performance: Methods to Identify and Add Meaningful Value
- 82. Strategic Planning: From Formulation to Action
- 83. Strategy Implementation: Behaviors and Frameworks that Inspire Success
- 84. The Human Margin: Foundations of Trust
- 85. The Network Evolution: How to Position Your Ambulatory Care Network for Future Success
- 86. The Strategic Use of Healthcare Analytics
- 87. Tactics & Strategies for Mastering Revenue Cycle Management
- 88. Taking an Emotionally Intelligent Leadership Approach to Change Management
- 89. Thriving Together: Well-being Solutions for What We've Been Missing in Healthcare Delivery
- 90. Transformational Leadership in the C-Suite: Strategies for Success
- 91. Transitioning From the Military to Civilian Healthcare
- 92. Where Wellness Meets Work: System-Based Solutions to Address Burnout and Promote Clinician Wellbeing

Leadership Assessments:

- 1. Career Anchors Assessment
- 2. Change Management Leadership Assessment
- 3. Conflict Management Assessment
- 4. Emotional Intelligence Assessment
- Extended DISC Assessment
- 6. Leadership Assessment
- 7. Power/Influence Assessment

Self-Study Courses:

- 1. Accelerating Leadership Development in Yourself and Your Organization
- 2. Achieving the Group Practice Advantage
- 3. Advancing the CEO's Role in Healthcare Philanthropy
- 4. Building Clinical Systems That Produce Excellent Outcomes
- 5. Building Self Awareness to Prevent Career Derailment
- 6. Coordinated Care: Improving Clinical and Financial Performance
- 7. Creating Readiness for Change: Preparing Physicians and Administrators for Collaboration
- 8. Effective Strategy Execution
- 9. Healthcare Leadership That Makes a Difference: Creating Your Legacy
- 10. Improve the Experience of Care in Your Emergency Department
- 11. Integrating Global Trends into Your Organization's Strategic Planning

- 12. The Law and Patient Confidentiality: A Commonsense Guide to HIPAA and Beyond
- 13. Leading with Meaning: Tapping the Deeper Dimensions
- 14. Making Better Capital Investment Decisions
- 15. Managing the Risks of Social Media
- 16. Marketing Your Healthcare Organization
- 17. Reducing Burnout by Developing a Participative Culture
- 18. Tools and Techniques for Physician Engagement
- 19. Understanding Cost Allocation and Profit Analysis
- 20. Understanding Financial Statements
- 21. Understanding the Impact of Financing Decisions
- 22. Using Pricing, Budgeting, and Revenue Cycle Management to Improve Performance
- 23. Working Together While Maintaining Distinctiveness: Healthy Administrator-Physician Relations

Other:

- 1. ACHE's Career Center Products and Services (ache.org/career-resource-center)
- 2. ACHE's Code of Ethics (ache.org/about-ache/our-story/our commitments/ethics/ache-code-of-ethics)
- 3. ACHE's Diversity Resources (ache.org/about-ache/resources-and-links/diversity-resources)
- 4. ACHE's Ethical Policy Statements (ache.org/about-ache/our-story/our-commitments/ethics/ache-code-of-ethics/ aches-ethical-policy-statements)
- 5. ACHE's Ethics Self-Assessment (ache.org/about-ache/our-story/our-commitments/ethics/ethics-self-assessment)
- 6. ACHE's Ethics Toolkit (ache.org/about-ache/our-story/our-commitments/ethics/ache-code-of-ethics/creating-an- ethical-culture-within-the-healthcare-organization/ethics-toolkit)
- 7. ACHE's Mentoring Network (member's-only area) (ache.org/career-resource-center/advance-your-career/ leadership-mentoring-network)
- 8. ACHE's Policy Statements (ache.org/about-ache/our-story/our-commitments/policy-statements)
- 9. Free From Harm: Accelerating Patient Safety Improvement Fifteen Years After To Err Is Human from the National Patient Safety Foundation. Boston, MA: National Patient Safety Foundation; 2015.
- 10. Leading a Culture of Safety: A Blueprint for Success by ACHE and the IHI/NPSF Lucian Leape Institute (http://safety.ache.org/)





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