

# **The BPHC Newly Funded TA Web Guide Resources for New and Existing Grantees**

## **Developed by:**

The U.S. Department of Health and Human Services (HHS)  
Health Resources and Services Administration (HRSA)  
Bureau of Primary Health Care (BPHC)  
Office of Training and Technical Assistance Coordination (OTTAC)

The BPHC Newly Funded TA Web Guide is a self assessment tool designed to help new BPHC grantees provide high-quality primary health care from the day they open their doors for business. The Guide is a central hub for links to HRSA-approved templates, information pages, and policy documents, and many other resources. The intent of the Web Guide is to help Health Center grantees improve their quality and efficiency, work within Health Center Program Requirements, and access Federal policies, programs and resources intended for the specific needs of Health Centers.

This document is a printable version of a portion of the content available on the Web Guide. It was developed by the BPHC Office of Training and Technical Assistance Coordination and is hosted at:  
<http://bphc.hrsa.gov/technicalassistance/index.html>

## 4a. Program Requirement 9: Key Management Staff

**Requirement:** Health center maintains a fully staffed health center management team as appropriate for the size and needs of the center. Prior review by HRSA of final candidates for Project Director/Executive Director/CEO position is required.

**Authority:** Section 330(k)(3)(H)(ii) of the PHS Act and 45 CFR Part 74.25 (c)(2),(3)

**Where to look for answers:** 1) Key Management Staff job descriptions, 2) Performance Evaluation forms for key management staff, 3) Staffing/ Organizational Chart

**Links and Additional Resources:**

[Executive Officer Performance Assessment\\*](#).

*\*Note: All non-Federal documents are for use as aids to consultants and grantees, the contents of such documents are solely the responsibility of the authors and do not necessarily represent the official views of HRSA, and should not be considered official guidance by BPHC. Any “sample” documents must be tailored to the health center’s unique circumstances and needs.*

**Table 1: Key Management Staff Questions**

These questions are intended to help grantees self-assess whether they are maintaining a fully staffed health center management team.

#	Question	Answer
1.	Does the health center have a Chief Executive Officer or Executive Director/Project Director?	
2.	Does the management team include a Clinical Director, Nursing/Health Services Director, Chief Financial Officer, and Chief Information Officer or other key management staff as appropriate for the size of the organization?	
3.	Is the team fully staffed, with each of the positions listed above filled as appropriate? <b>Note:</b> If the grantee has an open position for or pending change in Project Director, the Project Officer and/or consultant may wish to remind the grantee that this is a “Prior Approval Request” that must be submitted/ processed via the EHB Prior Approval Module and to contact their Project Officer for further information as needed.	

**Table 2: Additional Key Management Staff Questions**

These questions are intended to help in assessing how a grantee can improve their management practices for key management staff.

#	Question	Answer
1.	Are key management staff directly employed by the health center?	
2.	Are key strategic planning goals tied to the performance evaluations for senior management staff?	
3.	What is the Chief Financial Officer's professional background?	
4.	For the Clinical or Medical Director:	
4.a.	Does he/she advise the CEO and Board on clinical issues, including QA/QI?	
4.b.	Does he/she have the lead responsibility to hire/dismiss clinical staff?	
4.c.	Does he/she have sufficient time in his/her weekly schedule to adequately carry out the dual responsibilities of provider and administrator?	
4.d.	Are methods in place to ensure competency in key positions?	
4.e.	If the health center has multiple sites, what systems are in place to manage/ coordinate operations among the sites?	
4.f.	Are there opportunities for improved communication, interaction, or support between the Senior Management Team and the Board?	