

Tools of the Trade for FQHC CEOs



Learning Objectives

1

Review options for leading & tracking the work happening in your CHC

2

Tips for staying afloat each day (appointments, delegation, EAs)

3

Discuss whether business models and AI can help

Agenda



- Daily Efficiencies
 - Tips, Executive Assistants
 - Artificial Intelligence tools
- Overseeing Major Priorities and Projects
- Solving Problems
- External Resources

*“Do not seek to follow
in the footsteps of the
old masters. Instead,
seek what they sought.”
– Matsuo Basho
(1644-1694)*

Daily Efficiency



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Maximizing the Benefits of an Executive Assistant



- Common EA roles:
 - Gatekeeper for calendar
 - Email organizer
 - Takes a first pass to identify high priority emails, delete spam, and respond or forward routine requests
 - Setup key meeting logistics and take notes
 - Especially board meetings
 - Track CEO task deadlines
 - Manage the organizational and board calendar
 - Board meeting schedule, annual staff events, strategic planning, key financial and HRSA milestones, etc.
 - Compile board reports
 - Act as point for routine board member inquiries
- How to make the role the most helpful:
 - Clarify your expectations regularly
 - Help them become well versed in the health center industry
 - Empower your EA to make decisions on your behalf
 - e.g., board president requests a meeting
 - Invest in their professional development
 - e.g., technologies (AI and task tracking) and skillsets (project management, communication)

Discussion: What works and doesn't work for you and your EA? What have you seen?

Works Well

- Review calendar together, schedule meetings, help ensure time to prep for each meeting, and end meetings on time
- Focus on relationship building
- Highly experienced EA who knows board and HRSA
- Outlined entire year for compliance so that EA can track everything down
- Clear delineation of role
- CLC used contracted/virtual EA, personality matched
- Checks email against deadlines to prioritize

Hasn't Worked

- Had to change their workflow to see meetings coming in (since the EA approved them)
- “Team” of task-driven assistants (instead of results-driven)
- Challenge to give represented/unionized staff views to emails



Tips to Stay Effective Each Day

- ☐ Adopt and stick to one task tracking tool and approach
- ☐ Keep a journal or otherwise reflect weekly on your work
- ☐ Take time Sunday night or Monday morning to review the week.
 - ☐ Similarly prioritize critical daily tasks as part of your routine.
- ☐ Set your big goals 90 days at a time (Stephen Covey's "rocks")
- ☐ Don't let your calendar be taken over by meetings all day (consider no-meeting afternoons, days, weeks, or months)
- ☐ Open door policy? Yes.
Taking care of other people's monkeys? No

What are
your tips?

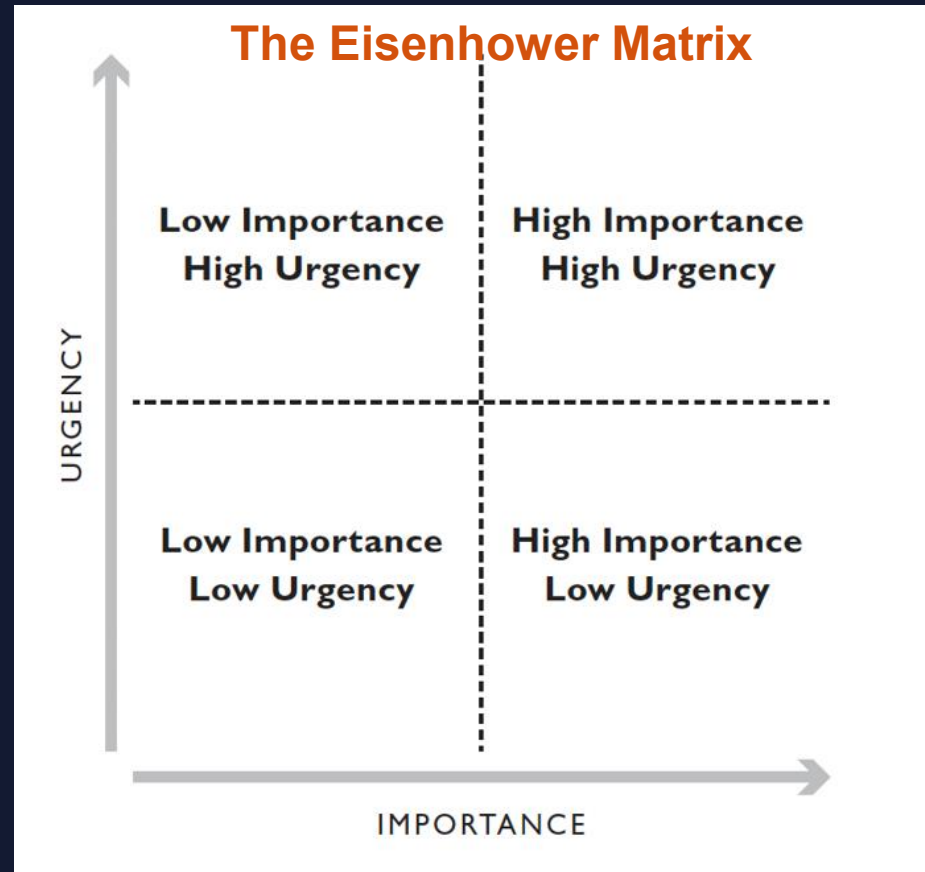


Everyday Leadership

- **Intentional Rounding, at least weekly**
 - Consistent internal messaging or theme
 - Advance research for team & member recognition, significant family events
 - Bi-directional – listen at least as much as talk
 - Acknowledge issues thoughtfully. Don't need to have all the answers, but close the loop afterwards – follow-up
- *See Hardwiring Excellence by Clint Studer*



The CEO's role is first and foremost strategic in nature. Your daily efforts should reflect this



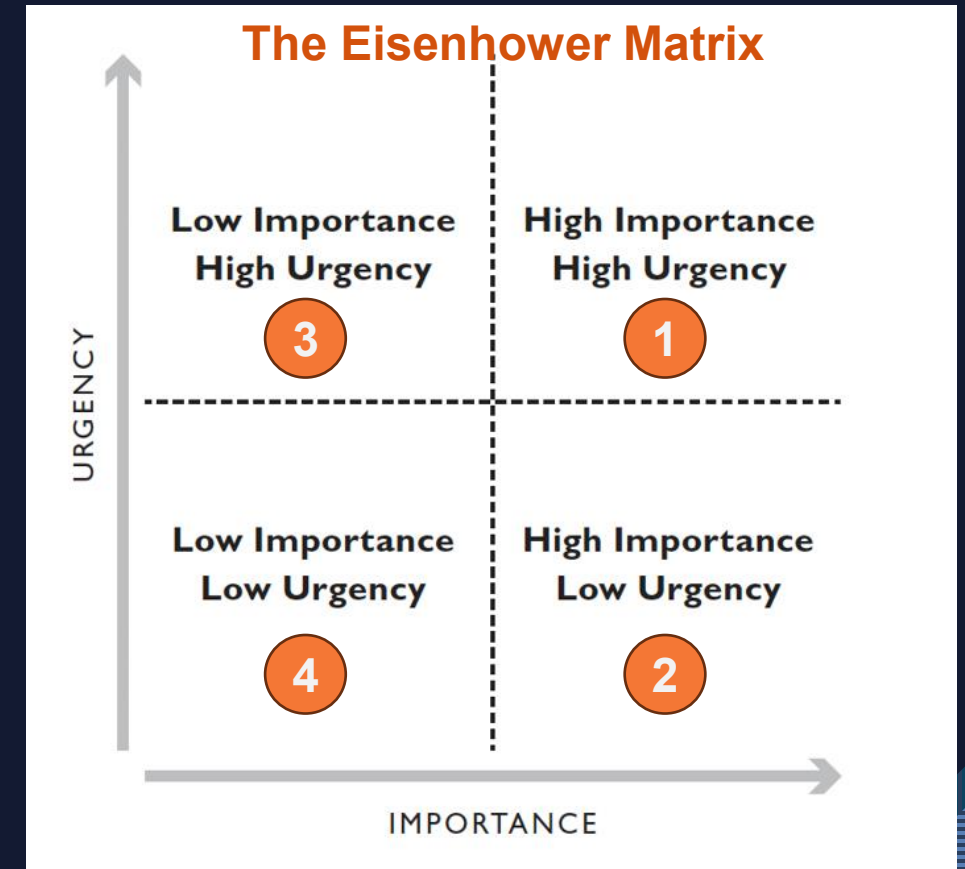
From: [How To Get Stuff Done: The Eisenhower Matrix \(aka The Urgent vs The Important\) \(forbes.com\)](#)

Examples for each quadrant



Try it out

- Consider your last work week
- First, jot down as many activities as you can that took more than a few minutes
- Next, write them in the appropriate quadrant of the matrix





Group Discussion



What does your distribution tell you?



Do the urgent/important items reflect areas central to your role?



What can you do to delegate the low importance items?

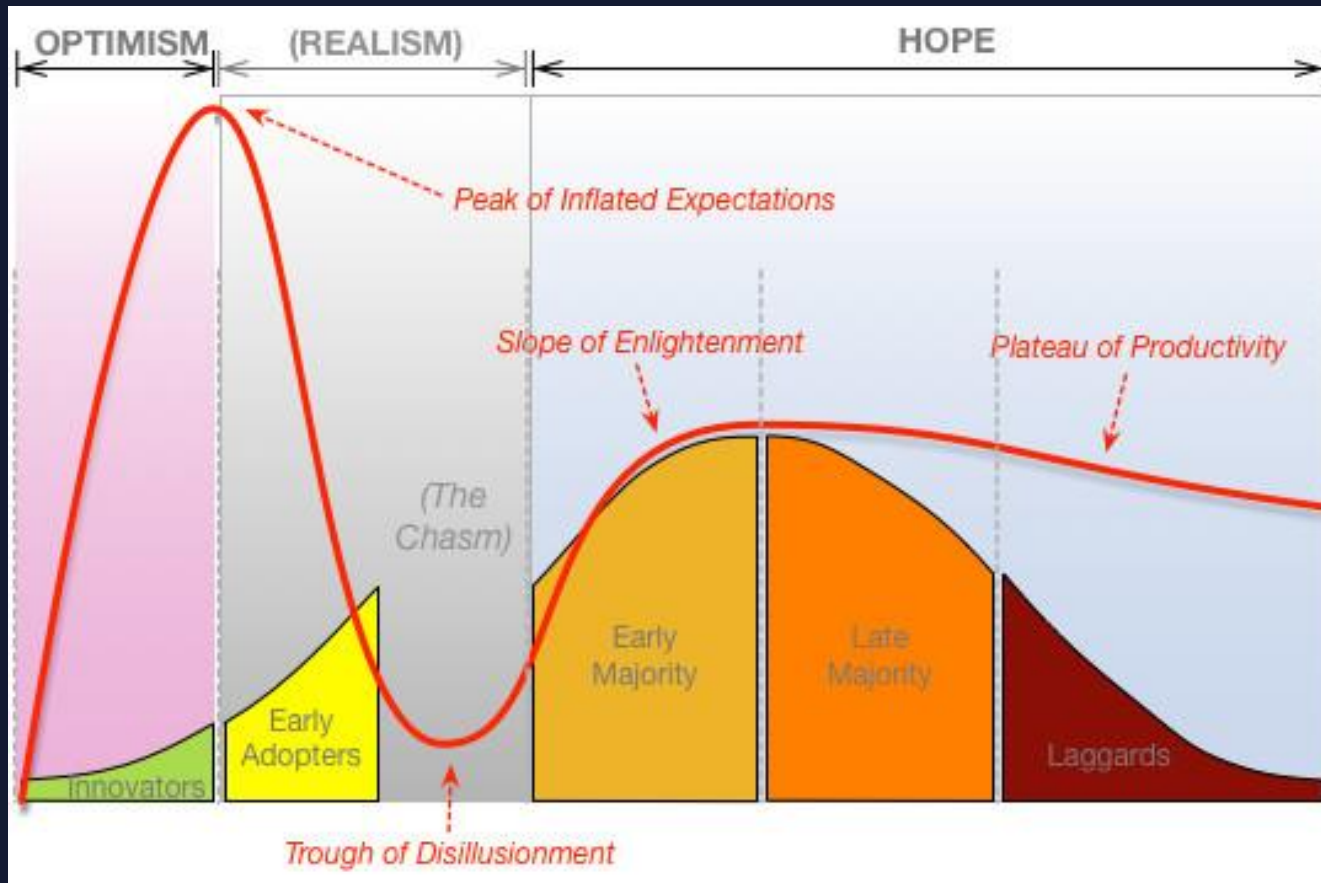


Can you eliminate any low-low items?



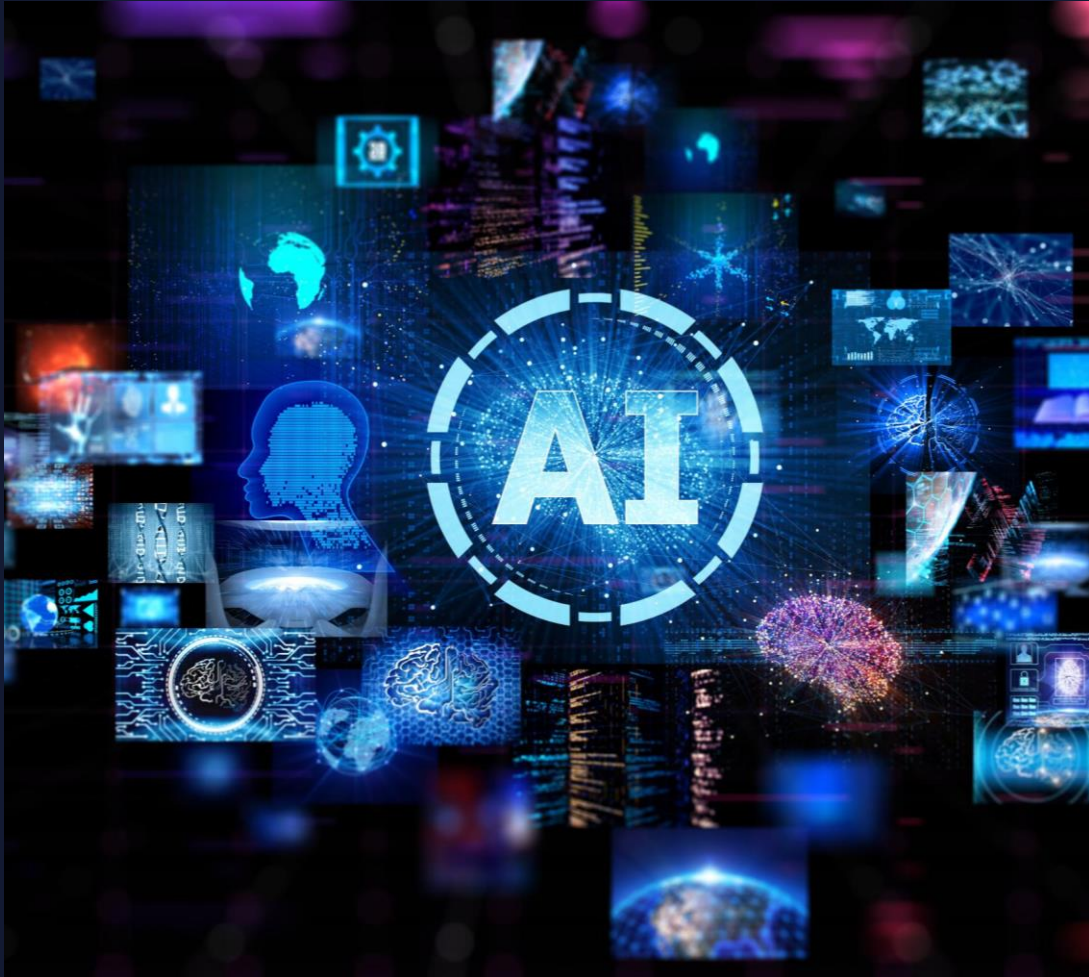
Can AI Help?

AI and the Technology Adoption Curve



- Consider where we are in the adoption and impact of generative AI
 - For the search use case: Late Majority
 - For ambient scribing: Early Majority
 - For predictive analytics: Early Adopters?
 - For AI agent-led workflows (agentic AI)?
- Where are you along the red curve of expectations and productivity?
- Conventional wisdom today:
 - AI needs guardrails and caution especially to protect health information
 - For many tasks, productivity gains are significant
 - AI can already support CEO-level work
 - You and your staff should already be harnessing generative AI tools

Understanding AI



- Every CHC leader can make use of generative AI tools. Key use cases:
 - Drafting a company-wide email, speech, or presentation
 - Summarizing your recent emails and identifying key areas of follow-up
 - Meeting notes and action items
 - Answering compliance questions
 - Be a sounding board for potential strategic improvements and community health needs
- Becoming adept at “prompt engineering” is critical
- Resources to get up to speed:
 - [Generative AI - Ways CEOs Are Driving Value](#)
 - [Mastering Prompts in ChatGPT](#) (8 min video)
- Be ready to harness AI for predictive analytics (population health management) and workflow automation

Questions to ask



Is my EHR platform benefitting from AI tools?

Ambient scribing is a game changer for clinicians
Billing and coding processes can benefit
Predictive scheduling can reduce no-shows



Are my leaders up to speed?

Do I have an IT leader who has invested time in learning AI tools?
Are my executives good at AI prompting? Are they using it for the basics, like meeting notes?



Do we have plan for the costs, risks, and benefits?

Who in your org will get a subscription to CoPilot or other tools? Is your data protected?

Priority and Project Tracking, Oversight, and Execution



CEO role in team oversight

- Projects and standing teams can proliferate in growing organizations
- Cross-functional collaboration becomes more critical, but more time consuming
- CEOs must balance micromanaging with making sure resources are deployed efficiently towards strategic goals
- Enforce “One-page bureaucracy” for:
 - Standing Team and Project Charters
 - Strategic Plan Summary
 - Meeting Agenda
 - Minutes & Action Items

Projects:

Temporary endeavors
undertaken to create a
unique product,
process, or service

Project Management definition adapted
from the
Project Management Institute



Discussion: Obstacles to good project or priority execution?



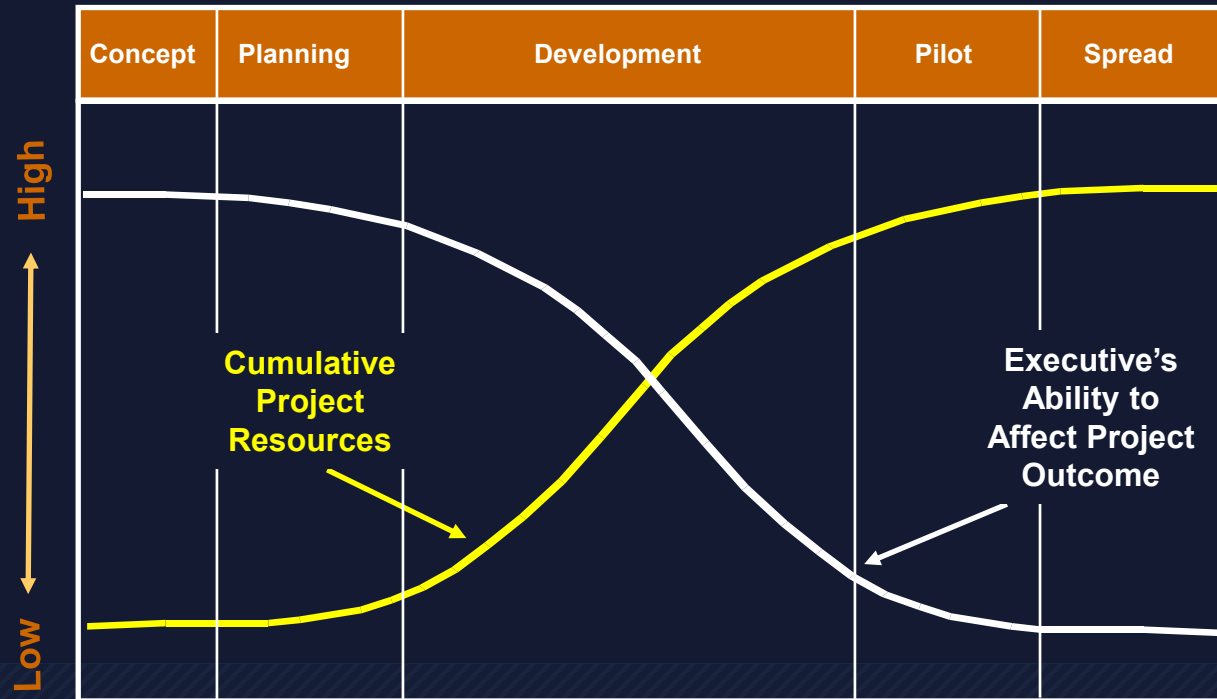
Obstacles to good project execution?

- ▶ Communicating “what’s going on” sufficiently and early enough
- ▶ Choosing to work on projects that best support our mission, vision, and strategy
- ▶ Not reinventing the wheel
- ▶ Marking transitions & celebrating success
- ▶ Ensuring projects are accountable to clear goals
- ▶ Putting successful new practices into place more quickly
- ▶ Lack of vision or commitment from the top
- ▶ Unforgiving operation environment

Why should CEOs take an interest in project oversight?

Quite often, management's energy is focused on solving problems too late

Project Resources and Ability to Affect Outcome



Have a problem?

First choose a problem-solving approach

	Low Complexity Problem	Moderate Complexity	High Complexity
Emergent Issue	Stay out of it (coach if needed)	5 Steps of Problem-Solving (discussion or workshop)	Project Team
Long-Standing Issue	Coach and Delegate	PDSA(s)	Embed in leadership and/or departments priority objectives

5 Steps of Problem-Solving

	Low Complexity	Moderate Complexity	High Complexity
Emergent Issue	Stay out of it (coach if needed)	5 Steps of Problem-Solving workshop	Project Team (DMACI, MFI, etc.)
Long Standing Issue	Coach and Delegate	PDSA(s)	Embed in leadership and/or departments priority objectives

1. Identify and define the problem

Simple:
Discussion

Complex:
5 Whys

2. Brainstorm potential solutions

Simple:
Informal ideation

Complex:
Structured Brainstorming

3. Evaluate options

Simple:
Pros & Cons

Complex:
Identify rating factors, rate, score

4. Decide on a solution

Simple:
Make the call

Complex:
Create a proposal, pitch it, decide

5. Implement

Simple:
Assign accountability and go

Complex:
Charter a project team, evaluate

Summary of Tips & Resources

- ✓ Invest time in defining your EA role and relationship
- ✓ Learn how to use AI in your daily work
- ✓ Enforce “one-page bureaucracy” for teams and projects
- ✓ Before solving a problem, learn the scale and choose a tool



Health Center Resources

(a sampling from outside your HC)



Sometimes, it
can feel crazy
and confusing!

But you're not alone!



Federal Resources

- **HRSA – Health Resources and Services Administration**
 - Conferences
 - Webinars – “Navigating the OSV Journey”
 - National Training and Technical Assistance Partners (NTTAPs)
 - Weekly e-digest, monthly “Today with Macrae” video conferences
- **CMS – Centers for Medicare and Medicaid Services**
 - CMS Daily Digest Bulletin
 - Medicare Learning Network (MLN)
- **SAMHSA – Substance Abuse and Mental Health Services Administration**
 - Behavioral Health, Substance Use Disorder grants
- **USDA – Department of Agriculture**
 - Facility grant and loan programs
- **FCC – Federal Communications Commission**
 - Telehealth and Internet connectivity grant programs





State Resources

- Primary Care Associations
 - Position-oriented Roundtables (e.g. COO, Pharmacy Director)
 - Annual education meetings
 - Board membership and officer opportunities for involvement
 - Annual UDS training
 - Peer connections
- Regional Primary Care Associations
 - Regional Conferences
 - Joint offering of focused training – NWRPCA & CHAMPS Governance Training Module
- State Health Departments
 - State Medicaid Agencies – Changes in Scope, Quality incentives, Medicaid Managed Care Reconciliations, Technical billing questions





Non-federal National Resources

- Community Link Consulting
- National Association of Community Health Centers
 - Legislative advocacy
 - New strategic pillars
 - 340B program monitoring and advocacy
 - Conferences – Policy & Issues Forum (P&I), Community Health Institute (CHI), Finance and Operations Management Institute (FOMIT)
 - “Webinar Wednesdays” – Navigating the Medicare Cost Report, Understanding and Preparing for 2025 Regulatory Changes, Marketplace Open Enrollment
- Institute for Healthcare Improvement
 - Annual national conference
 - White papers
 - Quintuple Aim





Non-Federal Resources, cont'd

- Law Firms
 - Feldesman/Leiffer (formerly Feldesman Leiffer Tucker Feidel), Powers Law
 - Training (virtual and at various locations) on FTCA, Uniform Guidance, the Compliance Manual, Risk Management, emerging Federal issues
- Accounting/Audit Firms
 - DZA (Spokane, WA), Clifton Larsen Allen (Minneapolis, MN), RSM McGladrey, Cohn Reznick, Berry Dunn, Moss Adams
- National Network for Oral Health Access (NNOHA)
 - Conferences, training, newsletters
- National Alliance for Hispanic Health
 - Grants, conferences, newsletters
- National Center for Farmworker Health





Additional Resources

- Organizational Development Consultants/Coaches
 - Enterprise Operating System (EOS)
 - The Table Group / Patrick Lencioni
 - The Waldron Group
 - Susan Smallidge (WA State)
 - ElementOne Consulting / Edmund Ura (formerly Mercedes Consulting Group)





Other resources known and recommended by the group?



Questions?
