

# Education for Business Leadership

CORE COMPETENCIES FOR  
PROFESSIONAL EDUCATION

OVERALL COMPETENCIES	RELATED COMPETENCY	SPECIFIC OBJECTIVE	ACTIVITY	CAPTE GUIDELINES
<b>COMMUNICATION APPROACHES</b> Skill in using myriad forms of communication that lead to effective relationships, improved understanding of the practice, sound practice analysis, operational problem solving, greater employee engagement, and optimal visibility and growth of the business	1. Professionally effective marketing and public relations	1. Perform professional effective marketing and public relations in promotion of physical therapist professional services	Create a marketing program for a new or expanding PT practice	7C2, 7D25
	2. Use of Interest-based negotiation to manage conflict and achieve shared outcomes.	2a. Understand terms of negotiation, mediation and arbitration in dealing with interpersonal relationships 2b. Understanding various causes of conflict of interest.	Negotiation activity for a practice position, staff or leadership. Review APTA code of ethics and state practice acts on COI.	7D25
	3. Expression of true partnership for health with patients and their families	3. Describe a clinical prevention program with patients and family involvement.	Develop a prevention program involving patients and families to improve health and fitness.	7D21, 7D18
	4. Broad-based networking within the local community and beyond	4. Describe a networking plan for community engagement.	Create a community involved networking program for the clinic.	7DB2, 7D21
	5. Open collaboration with inter-professional teams	5. Engage with other professions in clinical practice including MD, RN, OT, etc.	Develop a method for inter professional engagement in the clinical setting.	7D14
	6. Acumen in professional writing, including appropriate use of business nomenclature	6. Integrate business nomenclature in professional writing	Create a professional and accurate business plan for a PT practice.	7D24, 7D25
	7. Demonstration of good listening skills	7. Demonstrate effective listening skills	Practice with a partner. One partner shares a story and the other listens practicing these techniques  1) Demonstrate listening through body language and nonverbal responses 2) Reflecting back the content of what the partner shared 3) Reflecting back the emotions that the partner shared 4) Check for accuracy	7C2

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<b>PRACTICE MANAGEMENT</b> Acceptance and adoption of management strategies that fit the culture, values, vision, and mission of the practice; address a balance of clinical excellence, patient engagement, employee engagement, and financial success; respond to legal and regulatory requirements, maintain business stability in a fluctuating health care environment and support growth and change	1. Accurate and effective billing and collection for services	1a. Describe a step by step procedure for reimbursement. 1b. Discuss coding options for billing and its relationship to business profitability. 1c. Discuss the management of the accounts receivable (AR). 1d. Discuss some current billing and management software on the market. 1e. Discuss different reports needed by a physical therapist pertaining to billing, payment, and collections.	Write a policy and procedure for billing and collection. Create a charge master for PT billing with codes and prices. Evaluate a EHR and billing program. Review various reports needed at months end to evaluate practice performance	7D14, 7D24, 7D25
	2. Adherence to full portfolio of risk management principles	2a. Discuss risk and risk management from the standpoint of a PT Business. 2b. Discuss insurance needs for individual PT as well as small business including professional liability, workers compensation and general liability insurance	Discuss and outline the various risks that a PT private practice may incur. Describe the various insurance products available for a PT practice to purchase.	7D25
	3. Adoption of practice approaches that optimize safety	3a. Define the legal and financial basis for malpractice insurance. 3b. Discuss liabilities and crimes in health care to include professional negligence. 3c. Discuss the Standards of Care and APTA position on practice patterns to include Referral for Profit. 3d. Discuss liability of students conduct in clinical settings	Debate within a small group the value of each individual PT having their own professional liability coverage. Discuss pros and cons of RFP PT services from a personal, practice, public and overall profession standpoint. Describe cases of different student behaviors in the clinic.	7B3, 7B1, 7D17, 7D25
	4. Use of human resource approaches that embrace diversity and inclusion	4. Discuss personnel management including management styles, leadership characteristics, legal responsibilities associated with evaluation of staff performance, hiring and firing, standard benefit packages, and recruitment procedures.	Create a personnel manual for a new practice or business that includes staff hiring, termination and evaluation, policies and benefit packages.	7D25
	5. Continuous and visible action toward quality improvement	5a. Discuss practice performance based upon outcomes. 5b. Discuss risk and risk management from the standpoint of a PT Business.	Define quality measures that a business should aspire to. Discussion about various risks in a PT practice and how to minimize exposure.	7D17
	6. Transparency in budget design that honors essential levels of confidentiality	6a. Describe budget financial statements including balance sheet, income statement and cash flow statement. 6b. Discuss forecasting the financial future (cash flow) including a new business and budgeting of a physical therapy department.	Create a budget for a mock clinic. Analyze a clinic P & L for sustainability and success.	7D24, 7D25 7D24, 7D25

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		7b. Discuss the role of a PT as an independent contractor.	Analyze the legal and ethical requirements of a physical therapist as an independent contractor.	7D24, 7D25
		7c. Describe the legal requirements of the physical therapist as an employer	Analyze the PT practice setting from the PT as an owner and employer of other PTs.	7B3, 7D25
	8. Integration of basic business skills and knowledge to all settings of clinical practice	8a. Discuss Financial Analysis Sheets including balance sheets and profit and loss statement.	Create a budget for a mock clinic.	7D24, 7D25
		8b. Construct and use spread sheets for financial analysis.	Analyze a clinic P & L for sustainability and success.	7D24, 7D25
		8c. Discuss the difference between variable costs, direct expenses, interest expenses and the effects of taxes on a business.	Analyze a clinic's P & L for sustainability and success in defining the different components of expenses.	7D24, 7D25

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<b>BUSINESS VALUES AND CULTURE</b>  Respect and embrace the fact that every physical therapy setting is a business and must be led and managed for financial success. Understand the structure, parameters, and operation of different physical therapy business models that invoke and preserve the mission, vision and culture embraced by the profession and manifested by the individual practice.	1. Adherence to professional ethics and legal guidelines	1. Demonstrate adherence to professional ethics and legal guidelines through practice documents	Demonstrate adherence to professional ethics and legal guidelines through practice documents	7B3, 7B1
	2. Basic understanding of business principles and culture	2. Demonstrate a basic understanding of business principles	Demonstrate a basic understanding of business principles	7D24
	3. Design of business model that fits and serves market needs and opportunities	3. Incorporate market needs in a business model and plan	Create a business plan based on market analysis and needs assessment	7D25
	4. Commitment to financial integrity and literacy	4. Describe the use of budget and financial planning in operating a practice.	Create a fictitious P and L for a practice.	7D24, 7D25
	5. Respect for diverse contributions and perspectives	5. Incorporate various cultural and other perspectives into a practice model operation.	Create intake paperwork in different languages and pronoun usage.	7B1,7C3, 7D11, 7D18
	6. Use of collaboration and team action to achieve optimal outcomes	6. Demonstrate collaborative actions and a team approach to operations.	Create team building activities that facilitate company or practice operations.	7D23, 7D18
	7. Service as an educator and a mentor-coach to students and colleagues	7. Work with students and colleagues to educate others on practice operations.	Attend student educational activities at schools or bring students to practice	7D13, 7C
	8. Community contributions that show social and civic responsibility	8. Present to community organizations and groups.	Develop a community educational module or presentation on PT value.	7D21, 7D18, 7D20
	9. Use of disclosure and analysis of mishaps and errors as vehicles for growth	9. Describe evaluation methods to learn from mishaps and mistakes .	Incorporate a quality assurance program that measures errors and institutes corrective action.	7D17
	10. Advocacy of physical therapy as a vehicle to optimize health via movement	10. Describe efforts to prompt PT as movement specialists.	Develop resources either electronic or paper that promotes PT as a movement approach to health.	7D1A, 7D1B, 7D1Ca-i, 7D2, 7D3
	11. Adherence to the highest business and clinical standards	11. Demonstrate in policies adherence to high standards.	Review a current policy and procedure manual and evaluate the level of the standards used for quality of service .	7D17, 7D25
	12. Understand the economics of healthcare and how this impacts business decisions	12. Demonstrate the relationship between macro economic principles in healthcare and practice management.	Describe how economic factors in your state or community affect your practice model. Examples of economic indicators such as SES affects your business model.	7D23, 7D20

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<b>OPERATIONS AND ADMINISTRATION</b> Use of sound administrative procedures that manifest the commitment to excellence in clinical care and business management, ensure financial viability, and enable efficient and effective business operations.	1. Use of metrics to assess achievement of the Quadruple Aim and business success	1. List at least 5 specific metrics used in physical therapy practices	Review common metrics utilized at student's clerkship site. Define the Quadruple Aim <ul style="list-style-type: none"> <li>• How is this different than the Triple Aim</li> </ul> Collaborate with a small group of students to generate examples of behaviors to support each pillar of quadruple aim in physical therapy practice	7B, 7D14
	2. Regular use of both quantitative and qualitative measures of success	2a. Distinguish between different quantitative measures of success 2b. Distinguish between different qualitative measures of success	Create a report of student's own (or sample) performance while in the clinic including <ul style="list-style-type: none"> <li>• Units per visit</li> <li>• Patients per day</li> <li>• Collections per month</li> <li>• No show/cancel rate</li> <li>• % patients completing Plan of care</li> <li>• Denial rate</li> </ul> Evaluate productivity measures and standards commonly used in the practice area. Do they capture the value of PT provided? Why or Why not? Discuss what measures would best capture value to patient and payer? Describe common outcome measures that are utilized in PT practice. <ul style="list-style-type: none"> <li>• Important to patient vs important to payer vs to PT</li> <li>• Create an argument for which is more important – independent scales or those that are specific to the patient</li> </ul> Measure patient satisfaction related to care provided while on clinical affiliation State the arguments that would be made to convince various customers of the value of PT care you provide <ul style="list-style-type: none"> <li>• Patient</li> <li>• Referral source</li> <li>• Payer</li> <li>• Society</li> <li>• PT profession</li> </ul>	7B, 7D14, 7D24, 7D25
	3. Procedural design to optimize efficiency and effectiveness	3. Identify procedures and patient flow that optimizes efficiency and effectiveness	Map the process a patient goes through (at your clinical site) from the first call to their first appointment Conduct a time study of a typical patient's visit <ul style="list-style-type: none"> <li>• Times spent checking in</li> <li>• Time spent waiting in lobby and in room</li> <li>• Time spent with support staff</li> <li>• Time spent with PT</li> <li>• Time spent by PT with patient</li> <li>• Time spent by PT in non-patient facing tasks</li> </ul> Describe which portions do not add value to patient or therapist and can be modified?	7B, 7C2, 7C1, 7C, 7D14

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<b>OPERATIONS AND ADMINISTRATION</b> (CONTINUED)	4. Design of staffing patterns to enable operational consistency and efficiency	4. Specify staffing patterns in clinical site	List number of each type of staff utilized in each practice setting (PT, aide, PTA, front office, back office) Review surveys to determine highest level of complaints Identify wait time to get an appointment at affiliation site	7B
	5. Use of contemporary technology and health informatics	5. Analyze technology and health informatics available in PT practice	Label the most common Electronic Health Record systems utilized by PT in each setting Compare technology utilized in different types of medical practices Compare technology utilized in different industries vs in PT Recount ways that Health informatics are used to improve quality of care, outcomes, or patient satisfaction.	7B, 7D15, 7D19
	6. Use of effective procedures for a range of organizational and individual emergencies	6. Respond to or verbalize actions during emergency situations encountered in PT practice	Review policies and procedures in the clinical site Locate equipment available to PT to manage emergency situations Determine urgency of responses founded n policies and procedures	7B, 7D15, 7D23, 7D25
	7. Explain differences in payment sources and rules governing such entities (i.e. Medicare, Medicaid, Private Insurance, Supplemental Insurance, co-pays, Workers Compensation, etc.	7. Identify the different payment sources for PT and the rules for each.	Define the types of insurance/payer sources for each population seen in the clinical site Distinguish between the different sources of insurance (individual, employer, government) Describe compliance and regulatory requirement of each payer <ul style="list-style-type: none"> <li>• Reporting requirements</li> <li>• Fraud and Abuse</li> <li>• Participating in payer networks</li> <li>• Restrictions of each payer</li> </ul>	7B, 7B3, 7D7, 7D15, 7D24

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<b>STRATEGY</b> Discovery and use of knowledge and thinking approaches that promote responsible and responsive professional action. Apply strategies that differentiate a practice in a competitive health care market.	1. Active use of reflection and analysis	1. Recall clinical practices where you have worked as an aide, student, or been a patient and consider what was done well versus what could have been improved	Detail the guiding principles that drove decisions at these sites Describe the satisfaction level of patients, therapists, and staff? List the systematic measures used to establish satisfaction and/or obtain ideas from patients, staff, and clinicians <ul style="list-style-type: none"> <li>If none, list how they responded to complaints</li> </ul> Differentiate how these practices compared with others in the same community (compare to at least 5 similar) Imagine how you would set up that practice in the future and what it would look	7C1, 7C, 7D14, 7D23, 7D17
	2. Pursuit of evidence-based patient care approaches	2. Consider the pillars of evidence based practice (EBP) and the process for ensuring a practice uses evidence	List the EBP triad/pillars as described by Sackett Construct a process for utilizing EBP in your current and future practice Investigate best practices for creating and maintaining a journal club with peers within and outside of your practice	7B, 6A
	3. Application of sound clinical reasoning processes	3. Explain clinical reasoning and how it can be developed	Define clinical reasoning Describe how timing may affect a Physical Therapist's intervention Analyze a situation where you planned a particular intervention for a patient and your Clinical Instructor implemented something different. Explain what they considered that you had not Develop a peer review process that could be used in a clinic to ensure sound clinical reasoning in the therapists who work there	6F, 7B, 7D17
	4. Forward-thinking planning for change with deliberate strategic initiative	4. Develop strategies to create/facilitate change	Describe ways that a practice can identify necessary changes or improvements Create a plan, budget, list of benefits, objectives, and timeline for a strategic initiative	7B, 7D17
	5. Continual search for new perspectives to impact practice	5. Identify systems for increasing perspectives	Describe how to create focus groups to obtain input about the practice from patients, clinicians, staff, peers Propose methods of thinking that force you to consider other opinions ex. Argue for opposite of what you are deciding	7B, 7D23, 7D17
	6. Awareness of health care economics, market forces, and trends, and the impact of each	6. Develop ways of becoming familiar with trends	Describe how you can become more aware of trends List professional meetings you might attend to learn more about market forces Develop a list of publications/websites you would access for information about economics, market forces and trends in PT and outside of PT Describe how you discuss impact of market forces on your specific PT practice Identify ways you might gain information about economics from the activities of your clinicians and staff	7B, 7D23, 7D17, 7D20
	7. Application of clinical and business strategies in a competitive market	7a. Develop methods of utilizing marketing strategies in your practice 7b. Develop new practice areas that are underserved in your region	Identify differentiators that have appeal to patients <ul style="list-style-type: none"> <li>Describe how you will market these differences</li> </ul> Describe how you can identify hobbies/interests among clinicians in your practice to develop niche practices Describe niche practices and how they change your practice area Explain the advantages/disadvantages of cash-based practices	7B, 7D20, 7D24, 7D25



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<b>LEADERSHIP</b> Personal and professional approaches founded on self-awareness and fueled by creative thinking, innovation, influence, and bold action.	1. Understand concepts related to self-awareness and self-management in growth as a self-leader	1a. Develop Self-Awareness 1b. Develop Self-Management 1c. Create a growth plan	Integrate the best practice activities found in leading yourself and leading others Define self-awareness Describe self-awareness vs the perception of others Evaluate results of tests and identified opportunities - describe how these are different than expected List methods of how you can compensate for deficits identified <ul style="list-style-type: none"> <li>• Explain how you can find resources to help a particular issue</li> <li>• Identify and speak to a mentor to identify books to read or videos to watch – list these</li> </ul> Develop a plan to address opportunities for growth	7B, 7C, 7D17
	2. Engagement in self-assessment for discovery of strengths and needs	2. Utilize tests and measures	Utilize tests and measures to assist yourself in becoming more aware of yourself and how others see you <ul style="list-style-type: none"> <li>• Implicit bias</li> <li>• 360 reviews</li> <li>• Strengths finders</li> <li>• Myer-Briggs</li> </ul>	7B, 7C, 7D23, 7D17
	3. Understand philosophies and concepts related to leading others	3a. Understand philosophies related to leading others 3b. Understand concepts related to leading others	Review resources provided Describe different views on leading others Describe the differences between management and leadership List models of leadership Differentiate leadership by influence vs leadership by authority	7B, 7C
	4. Active engagement with others that engenders trust	4. Identify environments and behaviors that develop trust	Describe the concept of psychological safe environments Create a plan for creating a safe space for discussion Reflect on situations that have made you feel safe and open Reflect on situations that have made you feel guarded and reluctant to speak Discuss how to create behaviors that engender trust and engagement	7B, 7B3, 7C1, 7C
	5. Recognize personal biases through a growth mindset and openness to others' ideas	5a. Understand personal biases 5b. Understand growth mindset 5c. Describe openness to others' ideas	List the difference between overt vs implicit bias Take tests of implicit bias and analyze results Define a "growth" mindset List ways you can develop a "growth" mindset Define "openness" to ideas Reflect on situations where you have tried to influence a person who was not open to new ideas. Describe what activities have helped influence and what has failed Explain can you develop open ness to ideas Create a plan of behaviors to ensure openness during your discussions	7B, 7C2, 7C
	6. Transformation through the power of individual initiative as well as collective action	6a. Understand personal initiative 6b. Understand collective action	Define personal initiative Describe situations where you have seen personal initiative in yourself or others Define collective action Describe situations where you have seen collective action	7B, 7C2, 7C

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<b>LEADERSHIP</b> (CONTINUED)	7. Investment in career development and lifelong learning	7a. Understand career development 7b. Understand the concept of lifelong learning	Describe career development Design a plan of career development for yourself <ul style="list-style-type: none"> <li>• 0-1 year</li> <li>• 1-5 th year</li> <li>• 5-10 years</li> <li>• 10-20 years</li> <li>• 20-30 years</li> </ul> Identify methods of ensuring formal learning opportunities Identify informal learning opportunities Describe how you will ensure that you continue learning during your career	7B, 7C
	8. Willingness to introduce and test responsible disruptive innovations	8. Develop behaviors to introduce and test disruptive innovations	Define disruption Distinguish between behaviors that lead to innovation vs those that promote stagnation Reflect on your own biases and strengths – describe how these will lead you to tend toward stagnation vs innovation Reflect on your own comfort with change	7B, 7C1, 7C, 7D17
	9. Passion for excellence and persistence in movement toward that vision	9a. Identify your passions 9b. Assess behaviors that move you towards your vision	Reflect on the activities that energize you – these are things you are passionate about Compare things that inspire you versus things that frustrate you Choose between the practice settings and patient populations that best fit your passion Prepare a list of behaviors that enable you to follow your passion and move you towards your future goals	7B, 7C, 7D17
	10. Describe APTA's relationship and efforts to assist with practice protection related to therapy cap, codes and other aspects affecting practice	10. Understand the role of professional organizations in advocacy	List the different types of advocacy and beneficiaries Review the APTA legislative advocacy section of their website Describe the history of the Medicare therapy caps and its implication to patient care Describe current national efforts of the APTA Describe how you can assist with efforts. Reflect on the APTA efforts – do you agree with them? If not, how can you influence the profession	7B, 7B3, 7C2, 7C1, 7B2, 7C, 7D17