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INTRODUCTION

Take Care project aims to design an integrated and global system to improve and to promote the access to long-life learning to Managers in Health and Care Institutions in Europe.

On the one hand, this model includes the definition Competence Framework for the specific profile of Managers in Health Institutions, according to “ European Qualification Framework” (EQF) and the “ European Credit system for Vocational Education and Training ” (ECVET).

On the other hand, it includes therefore useful training tools for the main implied actors and, finally, we propose recommendations for its implementation and transference.

Work Package 3 takes as a principal objective to define a frame of competences for Health Institutions Managers which can be recognized and used at an European level, as regards the “European Qualifications Framework ” (EQF) and the “ European Credit system for Vocational Education and Training ” (ECVET).

The development of this Certificate has been able to “be born” thanks to

- **“State of Art” carried out inside Work Package 2** which has helped to detect all the information about the different European Health providers (nurses, hospitals, retirement homes, care service associations,) which will really allow focusing the needs in the countries of the Consortium and giving a European added value.
- **“INFO Training Toolkit” –Work Package 4.-** In its first stage of it, partners have worked in to create the contents of the Info-Formative kit for Health Sector Managers through managing a differentiated workforce with regard to specialisation and internationalisation which-next to Cert MHS -will favour in the future mobility of professionals, trainees and trainers.

Main usages proposed for this framework:

- To facilitate and to plan the professional development for our target group
- To complete a diagnosis about the mastered and the absent competences
- To stand Take Care learners in appropriate frame of competences
- To detect and to develop training /learning opportunities
- To promote the accreditation / validation of professional competences





Cert MHS

Cert MHS Innovative Health Service Certifications- MANAGERS IN THE HEALTH SECTOR – an initiative towards an Europe Certification to be used by VET and professional training institutes that provide specific training in line with the **Take Care** info-formative training tools.

Cert MHS is the acronym for **Certified Managers in Health Sector** and is a project within the Level 5- 6 inside programme of the EU, basing **their knowledge** on

- Advanced knowledge of a field of work or study
- Involve critical understanding of theories and principles

and based on the following **established skills**:

- Advanced skills
- Demonstrate mastery and innovation
- Required to solve complex and unpredictable problems in a specialised field of work or study

As well as demonstrate Level 5- 6 competences as follows:

- Manage complex technical or professional activities or projects
- Take responsibility for decision-making in unpredictable work or study contexts
- Take responsibility for managing professional development of individuals and groups

Cert MHS is based on researches, ideas and findings by Take Care partners, facing all crucial found obstacles towards a common European Research

Cert MHS aims at building up a framework to qualify **MANAGERS IN THE HEALTH SECTOR** on a trans-national level and with mutual recognition in Europe through an initiative by six European countries

Take Care partners have provided with a deep research on skills, competences, work activities, national level of qualification, learning modules and comparative equivalences with European Qualification Framework. Not in all countries EQF levels have been officially defined, for this reason, this **Cert MHS** will help to get a professional degree that emphasizes the conceptual, analytical, and applied skills required to advance into management careers in hospitals and health Institution in Take Care countries as well as help candidates in mobility through European Labour Market.

In order to understand the process of this Certificate, first of all, we will provide with countries researches in terms of:



WORK ACTIVITIES:

The most valuable, current and tacit activities achieved by **Managers in Health Institutions** are:

- ESTABLISHING AND MAINTAINING INTERPERSONAL RELATIONSHIPS
- MAKING DECISIONS AND SOLVING PROBLEMS
- COMMUNICATING WITH PEOPLE OUTSIDE THE ORGANIZATION
- JUDGING THE QUALITIES OF OBJECTS, SERVICES, OR PEOPLE
- STRATEGY, COORDINATION
- EVALUATING INFORMATION TO DETERMINE COMPLIANCE WITH STANDARDS
- OPERATIONAL RESPONSIBILITY
- DEVELOPING AND BUILDING TEAMS
- STAFFING ORGANIZATIONAL UNITS
- PERFORMING ADMINISTRATIVE ACTIVITIES
- ANALYZING DATA OR INFORMATION
- USE OF NEW TECHNOLOGIES-COMPUTER SYSTEMS-
- MONITORING AND CONTROLLING RESOURCES
- IDENTIFICATION OF THE KEY SERVICES PROVIDED BY HEALTH AND WELFARE FACILITIES
- ORGANIZING, PLANNING, AND PRIORITIZING WORK

MAIN TASKS:

Health Institutions- Private / Public are required to manage the cost, delivery and quality of healthcare service. Tasks related to Management in Health Centres are focussed on the collaboration with medical staff leaders in order to coordinate daily responsibilities. They must be prepared to coordinate departmental budgets with each department head as well as discuss any medical equipment and supplies.

Depending on the department and the specific nature of the Health Institution, tasks may involve:

- MANAGE THE RECRUITMENT, SELECTION AND DEVELOPMENT OF STAFF.
- IMPLEMENT NEW POLICIES AND DIRECTIVES.
- OVERSEE THE DAY-TO-DAY MANAGEMENT OF THE INSTITUTION.
- WORK TOWARDS ENSURING QUALITY AND VALUE FOR MONEY.
- ATTEND MEETINGS AND WRITING REPORTS.
- PURCHASE EQUIPMENT AND SUPPLIES, AS WELL AS ORGANISE STORES.
- SUPPORT ICT SYSTEMS AND PLAN NEW DEVELOPMENTS.
- HANDLE RELATIONS WITH INSTITUTIONS
- DEFINE THE ORGANISATION'S POLICIES AND STRATEGIES
- QUALITY ASSURANCE AND RISK MANAGEMENT
- SETTING BUDGETS AND MAINTAINING FINANCES WITHIN TIGHT CONSTRAINTS
- CLINICAL GOVERNANCE AND AUDIT



Cert MHS must be strongly linked with skills, knowledge and competences required for a better understanding in further proposed Learning Modules

GOALS ON CERT-MHS

One of our main goals in TAKE CARE project is to define these learning outcomes for **Health Service Managers** qualifications and also to support stakeholders in vocational education and training in partner countries in applying the learning outcomes-**oriented ECVET approach**. In doing so, both the description mode as well as the approach to the formulation of learning outcomes will be tested in Virtual workshops with international stakeholders for validation of Managers' EQF, as Work Package 6 outcome.

The learning outcome descriptions will bring transparency to the differences and similarities among Health Service Managers qualifications for/in the countries participating in TAKE CARE project.

In order to be accredited with **Cert MHS**, learning outcomes will be listed in a catalogue of units. Every unit will be defined as a set of knowledge, skills and competence which will constitute a part of a qualification. One or several of these qualifications will be assessed, validated and, possibly, certified. Units of learning outcomes will be structured comprehensively and logically in order to be assessed

In order to implement **ECVET** it is obviously also necessary that qualifications are described using learning outcomes. Learning outcomes are grouped to create units.

Assessed learning outcomes constitute credit. Credit is the basis for enabling the transfer between learning contexts and for the accumulation of learning outcomes.

Inside ECVET, learning outcomes are used as a basis for credit transfer and accumulation. Learning outcomes are not dependent on the learning process, the content of teaching or the learning context in which they have been achieved and therefore it is possible to use them to identify whether what learners have achieved in one learning setting or context is comparable to what they are expected to have achieved in another setting or context.

The main goal of this certificate is to facilitate the development of knowledge skills and competences in the areas of management, finance and leadership within healthcare Institutions.



Criteria for Cert MHS

Certificate proposed by Take Care team - **Cert MHS** -will provide learners and working professionals with the advanced knowledge of management principles and health services administration to gain positions of leadership within healthcare Institutions. They also may qualify for professional certification in their area of expertise.

This Certificate program has been designed in order to help individuals increase their background in marketing, management and financial principles.

Through obtaining this Certificate, future/present HSM professionals will be encouraged on investigating policies and regulations that can affect managerial decisions in the field. They will also learn to oversee employees, create new management systems and prepare healthcare facilities for future technologies.

Units have been designed in order to be completed as independently as possible of other units of learning outcomes. They have also been structured and dimensioned in such a way that the relevant learning outcomes can actually be achieved in the given training scheduled time, including all necessary learning outcomes, describing the intended professional competences as well as the necessary social and personal competences in such context. At the same time, they have been oriented towards occupational activities and tasks what will make easier to determine assessment criteria.

Units will be assessable in order to orientated towards occupational activities and tasks, what will make it easier to determine any assessment criteria



LEARNING MODULES/UNITS

UNIT 1.- FUNDAMENTALS OF MANAGEMENT FOR HEALTH INSTITUTIONS

SUMMARY

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In this unit, participants will be able to work on how to manage in health care organizations, including management processes, organizational structures, and types of management issues in Take Care countries and also linked with EQF systems. Topics:

- Introduction to health care system.
- Management in health care organizations.
- Approaches to performance improvement.
- Health care environments.
- Financial management concepts.
- Administrative management responsibilities.

LEARNING OBJECTIVES

Upon successfully completing this unit, learners will be able to:

- analyse health care organizations and their functions in order to facilitate any change and performance improvement
- Discuss the role and expectations of managers in health Institutions
- Make clear description of tasks and processes required to manage an effective health Institution.
- Use of Case studies in order to evaluate management and technical challenges in Health Institution Management
- Apply management tools to the achievement of an efficient analysis in current Health Institutions issues.
- Describe the approaches and processes required to manage an effective health care organization
- Demonstrate the ability to work collaboratively in team-based assignments

PROPOSED TOPICS (to be re-defined depending on National needs)

- Organizational structure and design
- Types of health care organizations and delivery systems
- Clinical services and roles
- Management in decision making
- Current measurable goals and objectives
- Continuous quality improvement
- Measuring and monitoring any organizational performance





UNIT 2.-. FUNDAMENTALS OF FINANCIAL MANAGEMENT

SUMMARY

Contents in this Unit 2 will provide both, theoretical and practical application to current financial principles and practices. We will emphasize financial as language of business with pragmatic learning approaches and will use of financial statements, external and internal. It will also include a clear understanding on the environmental which may drive the requirements for financial statements.

LEARNING OBJECTIVES

Upon successfully completing this unit, learners will be able to:

- Distinguish between managerial and financial accounting
- Discuss the key elements in cash-flows statement
- Deliver clear explanations about any change on financial position.
- To give clear evidence of basic discussions on financial transactions and how they are recorded and presented in the financial statements
- Analyse and interpret financial statements of a health care Institution.
- Show the ability to apply quantitative and qualitative tools and models to analyse, evaluate and improve organization and services.

PROPOSED TOPICS (to be re-defined depending on National needs)

- Financial Statements
- Source documents
- Analyse impact of transactions on accounts and financial statements
- Public Reporting
- Market Predictions
- Investments
- Current Liabilities
- Commitments and Contingencies
- Time Value of Money
- Benchmarks



UNIT 3.-. STRATEGIC PLANNING

SUMMARY

This third unit will be focussed on principles of strategic management and competitive analysis to support strategy development for health care Institutions. Fulfilling this unit, learners will be provided with an understanding of how current business and management knowledge is applied to Health Institutions to promote future success and competitive advantage through examining current models, leading to learners to assess and develop an organization's mission, evaluation competitive; threats and responses and developing organizational strategies and measures of success.

LEARNING OBJECTIVES

Upon successfully completing this unit, learners will be able to:

- Develop a strategic plan for a Health Institution.
- Place situational assessment and competitive analysis.
- Assess and make strategic choices
- Identify alternative processes for developing strategic plan
- Identify appropriate decision-making tools in order to create and implement strategies

PROPOSED TOPICS (to be re-defined depending on National needs)

- What is Strategy?
- Developing Strategic Options
- Situational Assessments: External and internal
- Strategic plan assessment
- Practical strategic plan assessment



UNIT 4.- MARKETING IN HEALTH CARE ORGANIZATIONS

SUMMARY

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Unit 4 will help to introduce learners to marketing concepts in health care. Students will learn how to conduct a situational analysis, understanding the market and consumer behaviour as well as assessing the competences inside the Health Institution. Market research techniques will be explored and also marketing strategies will be discussed..

LEARNING OBJECTIVES

Upon successfully completing this unit, learners will be able to:

- Explain the value and the purpose of marketing function inside Health Institutions
- Create an effective marketing plan for the Institution.
- Describe and explain the role and responsibilities of a marketing professional in the health sector
- Apply modern marketing tools to analyse markets and, also, to influence people within them
- Employ group decision-making dynamics.

PROPOSED TOPICS (to be re-defined depending on National needs)

- Who is “buying” what? Why?
- Motivation and decision-making
- What is Institution “selling”?
- Products and services
- Understanding needs
- The power of questioning
- How to identify opportunities and to improve systems and procedures, and offer new ideas.



UNIT 5.- HUMAN RESOURCES IN HEALTH ORGANIZATIONS

SUMMARY

On achieving this fifth unit, learners develop basic understandings of human resources trends and issues in health Institutions. This module will emphasize ways to build and will also motivate an engaged workforce. In this section, we will review the legal principles for many human resources processes. Other topics include labour supply and demand theory; sourcing, recruitment, benefits; selection and orientation; compensation and performance management.

LEARNING OBJECTIVES

Upon successfully completing this unit, learners will be able to:

- Analyse how the multiple functions of Human Resources Management, can contribute to employee performance and productivity.
- Demonstrate an understanding of employment laws and how they affect Human Resource Management
- Learning on strategies to increase the health care labour supply and also to decrease labour demand.
- Describe the role Strategic Human Resources Management in creating a great work place environment.
- . Apply motivation theories to enhance employee engagement
- . Create and evaluate a compensation model that motivates employees and addresses legal concerns

PROPOSED TOPICS (to be re-defined depending on National needs)

- To provide accurate information, advice and answers on everything from regulatory issues and benefits administration
- To know the best ways to establish and maintain employee confidentiality
- To know legal information about hiring and firing
- To build the informal communication channels so that information can flow freely among the staff



UNIT 6.- CASE STUDIES IN MANAGEMENT AND DECISION MAKING

SUMMARY

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In this unit, participants will be able to analyse problems and develop strategies based on real case studies faced by decision-makers. This unit will help to develop skills in leadership, negotiation, analysis, communication, and human resource management.

LEARNING OBJECTIVES

Upon successfully completing this unit, learners will be able to:

- Practice communication skills to improve organizational effectiveness
- Identify how conflict emerges and how to deal with it in highly decentralized organizations
- Develop strategies to deal with complex human resource issues in health Institutions.
- Identify how confusion of mission and conflict of interest operate at board and management levels in health care Institutions.
- Identify roles, motivation, points of conflict, and means of resolution.

PROPOSED TOPICS (to be re-defined depending on National needs)

- Statements of 'reasons for the decision' that has been issued.
- Stage of final approval and authorisation of a proposal.
- How to describe the different roles and responsibilities of those who make decisions on the merits of any proposal.
- formal instruments which can be used to develop the information necessary for sound decision-making
- Have well understood environmental responsibilities
- To be aware of their responsibility to implement processes and use their results to better manage the environmental impacts

SUMMARY

This last module will provide learners with main concepts, methods and tools to enable them to design effective patient safety interventions and evaluate their impact. In it, we will also introduce them to the latest thinking on healthcare quality and patient safety improvement through interactive sessions and exercises as well as case studies which may have direct relevance for health practitioners.

LEARNING OBJECTIVES

Upon successfully completing this unit, learners will be able to:

- Identify and address barriers to improvement efforts
- Identify appropriate team members for safety improvement efforts
- Assess the roles of organizational, system and human factors in patient safety
- Describe and apply concepts and methods in organizational and human factors literature
- Evaluate the outcomes of patient safety
- Analyse the relationship between staff safety organizational culture and communication that influences patient outcomes

PROPOSED TOPICS (to be re-defined depending on National needs)

- Use of appropriate qualitative and quantitative methods to identify and prioritize patient safety problems
- Strategies for building a business case for improving safety
- Strategies designed to increase the use of evidence-based patient safety.
- Describe the elements of Risk Management
- Structures and processes designed to improve quality



TRAINING PROGRAMME

Trainings in order to get this Certification will include seminars or individualized research courses with the primary goal of teaching learners on how to apply leadership skills to the Health Care field.

They will learn how external relationships affect internal structures and policies. Learners will also develop leadership skills and discuss concepts of professionalism. Topics will include decision-making strategies, managing change and integrating personal and professional values in one's management style. Including as follows:

- Health services organizational systems
- Accounting and finance
- Marketing management
- Leadership principles
- Health services policy and economics
- Managed care systems
- Information technology in healthcare
- Project management in healthcare

CAREER OPTIONS

Certificate holders will have the necessary administrative expertise to qualify for management and leadership positions in a variety of healthcare Institutions such as the (possible) following ones:

- General and surgical hospitals
- Rehabilitation facilities
- Long-term care facilities
- Community clinics
- Healthcare associations

LEARNING OUTCOME UNITS will be filled according to the example given in the Take Care Guidelines and discussed in order to be implemented according to WP4 - **INFO Training Toolkit** and WP5- **Development of the M-game** -for a full achievement of **TAKE CARE project goals**



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