

Education Is Essential: A Deliberate Approach to Board Engagement

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To navigate the increasingly complex and dynamic landscape of modern healthcare, organizations must have steady, competent, and engaged leadership from their boards of directors. This was one of the many lessons of the COVID-19 pandemic: education and planning are essential to effective governance. At a time when the pace of change seems to be constantly accelerating, governance support professionals face their own challenges to ensure directors are equipped and prepared to address emerging challenges and advance strategic objectives.

The typical board structure and calendar offers four key opportunities to support director education and engagement: onboarding and orientation, committees, general board meetings, and conferences and retreats. This article addresses the unique path to education at each stage, key education topics based on pressing issues facing healthcare organizations today, and how to sustain learning and engagement over the long run.

Four Opportunities to Educate

Compared to healthcare, few industries require as much literacy and preparedness from their boards of directors. Effective governance—and therefore, high performance—in this highly regulated field means board members must be familiar with technical regulations, financial pressures, market conditions, the recruiting environment, strategic objectives, and more. Because these conditions constantly change, it is imperative to connect with board members frequently and at different points in their service.

This does not happen by accident. The governance officer or board liaison staff, with input from a key board committee—such as the committee responsible for nominations and governance policy—should set an agenda to ensure an effective and deliberate approach at four stages:

- **Onboarding and orientation:** Establishing expectations for new board members begins with recruiting but must be reinforced with a solid foundation during onboarding. The challenge is to get new board members up to speed and contributing quickly without overwhelming them. This can be accomplished with a three-channel learning plan:
 1. Provide self-directed learning resources for new board members to explore via web-based modules.
 2. Schedule in-person or online individual meetings with all key executives.
 3. Assign each new member a board mentor to cover unanswered questions, build confidence, and establish relationships.
- **Committee meetings:** The focused nature of committee work provides an opportunity to deepen understanding on key topics. Setting aside the first 10 or 15 minutes of each committee meeting allows discussion and reports from key staff, which can be supported by other resources, such as those from The Governance Institute.
- **General board meetings:** Most full board meetings open with a meal or social hour before getting down to business. This is the ideal time to introduce topics of education. The executive team can lead presentations and encourage informal dialogue without the hindrance of parliamentary rules. These natural conversations can help contribute to productive discussions when the board is formally in session.
- **Conferences and retreats:** The Governance Institute has a wealth of opportunities and resources to support engagement of board members. By stepping back from the day-to-day, directors can deepen their relationships with each other and members of the executive team.

Examples of Key Education Topics

Working with input from the appropriate committee, governance support staff play a critical role introducing education topics. Each hospital or health system faces its own set of challenges and opportunities requiring the attention of the board. However, some topics are universal and present opportunities for the board liaison officer to make connections to the board calendar:

- **Finances in healthcare:** Your board members likely come from diverse backgrounds, with equally diverse understanding of the business side of healthcare. It is important they understand the challenges of this relatively low-margin industry with heavy capital and labor costs.
- **Health systems and health plans:** The relationship between providers and payers is complicated even to industry veterans. With an increased emphasis on and

requirements for cost transparency, this is an important topic for board members.

- **Privileging and credentialing:** The extensive regulation of healthcare means this responsibility often is delegated to physicians on the board of directors. However, it's important for all board members to understand their role in privileging and credentialing.
- **Master facility planning:** This is a key component of every strategic plan, and it is essential for board members to understand the organization's positioning in the market.
- **Quality:** Helping board members understand the complexity of maintaining highly reliable services can help inform their decisions about staffing and investments.
- **Diversity, equity, and inclusion (DE&I):** A successful DE&I journey begins at the top for every organization. In healthcare, DE&I touches virtually every aspect of mission, vision, and values, so board members benefit from adding to their understanding of the topic.
- **Competitive landscape:** With competition no longer just geographically based, board members face more challenges than ever in ensuring the sustainability of their organizations to deliver healthcare to the communities they represent.

The Governance Institute has many resources supporting the education of board members on these topics and others.¹

A Culture of Continuous Learning

Doctors don't stop learning upon graduating medical school or completing residency. The medical professionals who make up our healthcare organizations understand that their education never ends. That's how they deliver the best care to their patients.

In the same way, the board members who govern this work must engage in continual learning to keep up with the relentless evolution of the healthcare industry. Board liaison officers can promote this by:

- **Setting expectations:** During orientation, help new board members understand the importance of continual learning and how it contributes to their effectiveness. Board mentors can also help encourage a culture of continual education.
- **Planning ahead:** Keep an eye on the board calendars for opportunities to dig deeper into topics. Be sure board members are prepared to address particularly

¹ See The Governance Institute's full library of resources at www.governanceinstitute.com/member_resources.

complex topics before they land on the agenda. Rely on executives and key staff to explore topics. Remember resources such as The Governance Institute.

- **Listening to the board:** Use simple surveys or polls to gauge knowledge gaps and add topics to the agenda. Observe the dialogue between board and staff and work with key committees to identify topics to address.

→ Recommended Resources

- [Building a Comprehensive Board Orientation Program](#) (Elements of Governance)
- [Board Orientation Manual, Sixth Edition](#)
- [Building a Board Education Program](#) (Elements of Governance)
- [Board Education and Development](#) (Intentional Governance Guide)
- [Lakewood Health System's Journey towards a Strategic, Engaged Board through Education](#) (Case Study)
- ["Governance Oversight in Challenging Times: Sustaining Healthcare Board Education Remains Imperative"](#) (E-Briefings Article)

Conclusion

An engaged board is an effective board, and one of the most important ways to ensure engagement is through education. By taking a deliberate approach to education, governance support professionals play a critical role in maximizing the effectiveness of healthcare boards.

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