

The Governance Institute

Onboarding Tips for Clinician Directors

Consider a customized orientation plan for physician directors. Although there are benefits to orienting all new directors simultaneously, an individualized approach can be highly effective and time efficient for clinician directors. Begin by conducting an informal assessment of the new clinician director's current knowledge state for key topics such as quality and finance. For example, if the clinician director has had significant experience with medical staff functions, it may be redundant to provide "Quality 101" and "Credentials 101."

Has the new physician director had experience in managing and operating the business aspects of his or her own practice? Physicians answering "yes" to this question should have a beginning level of financial knowledge, such as understanding financial statements, compared to physicians without this level of experience. Understanding the current state of the new board member's financial knowledge will direct the starting point for the financial orientation. A significant component of orientation should include time with the CFO to explain the basics of the financial statements, an overview of the investment philosophy of the organization, the long-term debt/capital funding situation, and current financial challenges the organization is facing.

New clinician directors are often not aware of the fiduciary duties of care, loyalty, and obedience. Teaching these concepts is one of the best ways for new clinician directors to understand their role as a member of the board. This is the time to emphasize that the board represents the organization and the community rather than a specific subset or group.

Explain how the board does its work—board committees, board meetings, the oversight of strategic planning, board retreats, and ongoing education. New clinician directors who have not served on other boards appreciate understanding the conduct of board meetings—how the consent agenda functions, voting procedures, discussion opportunities, and pre-meeting preparation requirements.

Clinician directors, who may not know many other board members, are interested in learning more than just their names. What is the brief occupational history of the other board members? What is their connection with the organization? What board committees do they serve on? How long have they served on the board?

Introduce the clinician to a carefully selected mentor—a fellow board member who can serve as an additional resource to the physician or nurse. Onboarding is not a single event. A successful onboarding extends throughout the new director's first year of board service. Provide the new physician director with specific educational materials that have been selected to be most meaningful for his or her needs. Ensure that the materials are easy to access on demand by the new director—directly send the specific links or documents.

After the first one or two board meetings, the CEO and/or the board chair should reach out to the clinician and ask:

- What questions do you have as a result of your first board meetings?
- What additional information would be helpful to you?

And finally, orientation materials for clinician directors should be crisp, concise, and on point. Clinician directors appreciate curated information—not 10 slides when one slide is sufficient.