

# The Need for Speed: Onboarding for Maximum Board Engagement

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Joining a board of directors can be analogous to starting a new job. While most healthcare board positions today remain unpaid, the transition into a board seat has many parallels to starting employment with a new company—the new member is excited to join the organization, ready to make an impact, and often keenly aware of the learning curve ahead. Many aspects of the role are still unclear, the people are largely unknown, the jargon is foreign, and, for many, the industry is brand new. Management, board leadership, and existing board members are equally eager for the new member to join—interested in the skills and new perspective they will bring, optimistic about their future engagement, and yet uncertain how the new member will commit their time and attention or influence the board culture.

Hospitals and health systems have invested in new employee training and orientation to ensure new hires are up-to-speed and performing at their highest level as quickly as possible. These same organizations should view new board members in a similar light. A common belief is that it takes anywhere from one to three years for a new member of a healthcare board to feel well-versed and ready to contribute at the highest level. That timeframe can seem much too long when the strategic opportunities and challenging headwinds facing healthcare today require that the entire board is knowledgeable, nimble, and functioning at maximum capacity. Healthcare organizations must find a way

## Onboarding Process



## >>> KEY BOARD TAKEAWAYS

### Pre-boarding:

- Provide prospective members with a written job description with clear roles, responsibilities, and expectations. Ensure that they understand board duties and are up for the commitment.
- Have candidates meet with multiple board members to learn more about the organization and the benefits and challenges of serving on the board.

### Orientation:

- Hold in-person orientation sessions that provide a detailed overview of the organization and board operations.
- Send new board members pertinent materials to review on their own (e.g., bylaws, past minutes, annual reports, committee charters, etc.), as well as a point person to contact for any questions that arise.

### Additional Onboarding:

- Have new board members meet individually with key senior leaders.
- Ensure the CEO and board chair meet with the new board member in the first six months of their board service.
- Pair new members with a seasoned board member who has the time and ability to dedicate to mentoring.
- Have new board members attend a meeting of every board committee at least once during their first year on the board.
- Offer the opportunity to round with providers and staff to see firsthand the mission in action.
- Develop an intentional ongoing education and engagement plan, building on the momentum created during onboarding.

to shorten the onboarding time for new members and have them fully engaged and contributing as quickly as possible. An ineffective or inefficient onboarding process can significantly limit engagement and involvement where directors are needed most. A thoughtful process will compress the learning and engagement curve to benefit the organization, the board, and the individual members.

Good governance practices limit the maximum tenure of directors. Therefore, healthcare organizations should find ways to optimize the onboarding process and maximize the thought leadership and overall contributions of each member. The most successful onboarding programs start early, are multi-faceted, and require a committed partnership and investment by the organization, the incoming board member, and the full board.

### Pre-boarding

The most critical component of onboarding may occur before prospective board members are ever elected, or what could be considered the “pre-boarding” period. Sharing clear expectations during the cultivation stage is the foundation for a successful onboarding experience and overall board member engagement. It is not uncommon during the cultivation process to downplay board member

expectations in hopes of successfully recruiting the candidate. Minimizing expectations on the front end can have lasting consequences over the course of the new board member’s tenure. The board member may believe they are meeting the expectations represented during recruitment while management and board leadership may be frustrated or disappointed with the board member’s perceived lack of engagement.

To avoid this misalignment, it is essential to be unapologetic in describing a director’s roles, responsibilities, and expectations to prospective board members. Hospital and health system board roles are strategic and complex and require a significant investment of time and involvement in and out of the boardroom. Management and board leadership must get comfortable with the fact that some board candidates will decline to join based on a realistic preview of the role. The cultivation phase is a time to share the mission, vision, and impact of the organization and it is equally important to share the realities of what is required to be a strong board member. Board candidates should receive a written job description with clear roles, responsibilities, and expectations. Prospective board members should meet with multiple board members to learn more about the organization and

gain a breadth of perspective on the many benefits and challenges of serving on the board. The goal is to have every new board member arrive at their first board meeting well versed in their role and responsibilities and committed and ready to engage immediately.

**Orientation**

Orientation should be a structured component of onboarding and scheduled as soon as possible upon a new member's election to the board. Depending on election practices, orientation may occur with an individual or a group of new members. Orientation is the concentrated educational component of the onboarding process and includes organized meetings as well as self-study. Orientation requires a time commitment on behalf

Orientation may span multiple sessions depending on preference and availability for one long session or two to five modules over several weeks. These meetings should provide an overview of the organization and board operations. At minimum, orientation includes:

**Organizational overview:**

- Tour of all major facilities
- History of the organization, including the origin story and key milestones
- Current strategic plan, including top two or three opportunities and challenges ahead
- Financial overview, including organizational financial position and an introduction to the healthcare business model

**Board operations:**

- Board and committee structure and roles
- Board and committee leadership
- Conflict-of-interest policy and process
- Board calendar, including scheduled board and committee meetings and key organization or community events
- Board meeting overview, including a preview of a typical board agenda and discussion of what to expect and encouragement to engage

**Self-Study**

In addition to a structured orientation program, new board members need to invest time in self-study early in their tenure on the board. The management team should determine the most pertinent materials for review and provide the best contact(s) if a member has questions while reviewing. Documents for self-study often include, but are not limited to, annual reports, financial statements, organizational bylaws, committee charters, 990 IRS filings, board and committee rosters, board-related policies, minutes from the previous three board meetings, a list of healthcare acronyms and explanations,<sup>1</sup> and the management organizational chart. Along with self-study materials, provide new board members with a clear point of contact for any questions that arise.

Some organizations consider orientation to be the full onboarding experience. While this concentrated education experience is necessary and foundational, it is not sufficient.

**Orientation Process for New Board Members**



**C-Suite 101**

The senior leadership team can play an impactful role in new board member onboarding. C-suite leaders provide subject matter expertise that is also organization specific. When new board members meet individually with key senior leaders early in their board service, there is an opportunity to accelerate the learning curve. For example, meeting with the Chief Financial Officer to review the budget and financial performance will not only provide an understanding of the organization but can also lead more quickly to an understanding of the complexities of the healthcare business model. Meeting with the Chief Strategy Officer provides an in-depth understanding of where the organization is going, why, and how progress will be measured. Spending time with the Chief Compliance Officer will quickly introduce key risks and mitigation strategies. The Chief Quality Officer or Chief Medical Officer can explain key quality indicators, why they are important, and the improvement plans underway. They can also provide education on credentialing and the role of the board, a process that is often foreign



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of new board members, existing board members, and management. It should be considered mandatory and included in the expectations discussion and document provided during pre-boarding.

**Structured Meetings**

Broad education for new board members is essential. Many members begin their board service without deep knowledge of the organization and very little understanding of the complexities of healthcare. If possible, these meetings need to be held in person to promote relationship building with management and fellow board members. While management may play a large role in orientation, other board members should participate as well.

<sup>1</sup> See *Healthcare Acronyms & Terms for Boards and Medical Leaders, 12th Edition*, The Governance Institute, 2023.

to new board members. While these are examples, there may be other members of the senior leadership team who should participate in the onboarding process. In addition, the CEO and board chair should meet with the new board member in the first six months of their board service. These individual conversations will provide knowledge and insights that may otherwise take years to discover through regular board meetings. In addition to the deep learning these meetings will bring, the relationship building between the senior leadership team and new board members can strengthen trust and transparency within the board culture.

### Board Immersion

Deep and wide exposure to the board can be one of the most impactful and efficient elements of onboarding. Creating opportunities for new members to connect with board colleagues will provide direct board perspectives, educate on current board focus and challenges, and build relationships. Examples of board immersion activities include mentor programs and committee rotations.

### Mentor Programs

Enlisting existing board members in the onboarding process can accelerate learning and help create a sense of belonging for new members. A formal mentoring relationship will typically last six to 12 months and is often led by the governance committee. The governance committee should regularly assess the board to determine who is willing and able to participate in mentoring. The ideal mentors will have significant knowledge of the organization and the board, be a positive voice, and have the time and ability to dedicate to mentoring. The pairing of new members with a board mentor should be thoughtful and intentional. Providing structure to the program will maximize outcomes and overall experience. For example, arrange for the mentor to attend orientation with the mentee, encourage them to meet monthly or bimonthly including shortly after each board meeting to debrief, and to address questions that come up from time to time for the new board member. Additionally, mentors can facilitate introductions to other fellow board members by inviting them to attend a monthly mentoring meeting. While the mentoring program is incredibly beneficial for the new member, it also contributes to the ongoing engagement level of mentor members.



### Committee Rotations

Another board immersion tactic during onboarding is to have new board members attend a meeting of every board committee at least once during their first year on the board. Experiencing firsthand the committee-level discussion and work will provide a closer perspective and deeper knowledge than is available during high-level report-outs to the board. This experience is also a means to find the committee(s) that are the best fit for the new board member, pairing up the member's interests and skill set with the board committee needs.

### Mission in Action

Board members who are the most passionate about the mission tend to also be the most engaged. The onboarding process provides an opportunity to deepen a new member's understanding of the unique impact the hospital or health system has in the community and beyond. To see the mission in action, board members should have direct exposure to patients, staff, and providers.

### Rounding

When board members can move outside of the boardroom and round with providers and staff, they see firsthand the mission in action. Board members need to be provided opportunities to accompany the medical staff during patient rounds, witnessing both the patient and provider experience. New members should also participate in staff rounds with management, listening to staff share

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their successes and challenges. Grounding new board members in the mission and the care provided across the hospital or health system daily can serve as a powerful foundation for board service. Participating in rounding provides a lens and perspective the board member can return to time and time again as decisions are made, keeping the patients, families, providers, and staff in mind. Rounding experiences shouldn't be limited to the onboarding experience; these opportunities can continue to strengthen board engagement year over year.

### Employee Events

Hospital and health system employees are the backbone of the institution, carrying out every aspect of patient care and service delivery. As part of the new board member onboarding experience, management should offer as many opportunities as possible for members to engage with staff. In addition to rounding, invite board members to participate in a new employee orientation session or any employee celebrations. Have new board members experience an

all-leadership meeting or an employee or provider town hall meeting. As a way to better understand the organization’s diversity, equity, and inclusion efforts, new board members can participate in a committee meeting or attend an employee resource group meeting. These opportunities provide a genuine view into the organizational culture and the passion and dedication of staff.

board chairs and management should challenge themselves to maximize strategic discussion during the board meeting. This will require the effective use of consent agendas and executive summary materials provided to board members with ample time for review in advance of the board meeting. Often, one strategic discussion will include multiple challenges and opportunities—financial

national healthcare landscape. Keeping board members apprised of evolving strategic opportunities and threats, as well as changes to regulatory requirements, is an important component of an annual education plan. Ongoing education needs to be provided in a variety of formats including live sessions with opportunity for interactive discussion (in-person or virtual), on-demand Webinars, curated articles, books, and podcasts, and board-focused conferences or other peer-learning opportunities.

**Sample Onboarding Plan**

The below represents a sample one-year onboarding plan assuming a December board election.

December	January	February	March
<ul style="list-style-type: none"> <li>Board election of new member(s)</li> <li>Assignment of mentor</li> <li>Orientation session(s)</li> <li>Facility tour(s)</li> <li>Self-study materials</li> </ul>	<ul style="list-style-type: none"> <li>Self-study (cont.)</li> <li>Orientation (cont. if needed)</li> <li>Mentor meeting #1</li> <li>C-Suite 101: Finance</li> </ul>	<ul style="list-style-type: none"> <li>C-Suite 101: Strategy</li> <li>Committee rotation #1</li> </ul>	<ul style="list-style-type: none"> <li>Mentor meeting #2</li> <li>Patient rounding</li> </ul>

April	May	June	July
<ul style="list-style-type: none"> <li>C-Suite 101: Quality</li> <li>Committee rotation #2</li> <li>New employee orientation</li> </ul>	<ul style="list-style-type: none"> <li>Mentor meeting #3</li> <li>Committee rotation #3</li> </ul>	<ul style="list-style-type: none"> <li>Staff rounding</li> <li>C-Suite 101: IT</li> </ul>	<ul style="list-style-type: none"> <li>Mentor meeting #4</li> <li>Committee rotation #4</li> </ul>

August	September	October	November
<ul style="list-style-type: none"> <li>Committee rotation #5</li> <li>CEO/Board Chair check-in</li> </ul>	<ul style="list-style-type: none"> <li>Mentor meeting #5</li> <li>Town hall or leadership meeting</li> </ul>	<ul style="list-style-type: none"> <li>Hold for any makeup needs—Committees or C-Suite 101</li> </ul>	<ul style="list-style-type: none"> <li>Mentor meeting #6</li> <li>Employee Resource Group meeting</li> </ul>

**Ongoing Education and Engagement**

The case is strong for optimizing onboarding programs to maximize the early contributions and engagement of new board members. To fully realize that investment, it is equally important to have an intentional ongoing education and engagement plan, or “post-boarding” program, building on the momentum created during onboarding.

**Strategic Agenda Management**

For new and long-tenured board members alike, strategic discussion will drive learning and engagement more than an agenda filled with management and committee report-outs. While there are essential items of business that must be managed during a board meeting,

implications, quality, compliance, staff and provider engagement, enterprise risk, and the external healthcare environment. These strategic discussions not only provide rich context and information for the board, but the management team is also able to leverage the many experiences and perspectives around the table.

**Continuous Education**

The dynamic healthcare environment demands ongoing and up-to-date education for governing boards. Governance committees can partner with management to create an annual board education plan. These plans should include education needs identified through board self-assessments and changes or trends in the local and

**Measuring Success**

Pre-boarding, onboarding, and post-boarding practices should be evaluated over time and evolve to meet the needs of the changing environment and new generations of board members. As members close out one full year of board service, the governance committee should solicit feedback to determine what worked best and what could be improved in the pre-boarding and onboarding process. Similarly, use the annual board self-assessment process to evaluate ongoing education and board and committee meeting effectiveness. Using this information to continuously improve will ensure new members have the information and knowledge to add value as quickly as possible, and all members are aware of the dynamic healthcare environment and are engaging at a high level.

Serving on the board of directors for a hospital or health system is an important and complex role. Each member of the board must be knowledgeable and engaged. Today, more than ever, there is a need for speed to effectively onboard new members and maximize their contributions. The rewards of having a new board member engaging at full capacity justify significant investment on the front end by the management team, the board, and the new member. This investment can result in a highly knowledgeable and effective board moving the organizational strategy forward.

For additional Governance Institute onboarding resources, view [www.governanceinstitute.com/boardorientation](http://www.governanceinstitute.com/boardorientation). Also see our *Intentional Governance Guides* at [www.governanceinstitute.com/intentionalgov](http://www.governanceinstitute.com/intentionalgov).

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