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Governance Notes

Elevating the Board Onboarding Experience

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Health organizations have a precious opportunity to leverage the unique influence and insights of community leadership volunteers who serve on the board.

Yet, many board leaders describe the onboarding experience as a deflating, check-the-box endeavor to convey access to organizational documents rather than a meaningful and effective process to set them up for success. At the same time, many board support professionals counter that it feels impossible to balance a meaningful onboarding experience with the genuine time constraints of busy leaders. To get board members educated, acclimated, and integrated to add value from the start, here are a few considerations for improving design and delivery of the board onboarding experience.

Craft Journeys

Board orientation is often an event. Leaders hunker down for a day—or days—to thumb through fat binders of materials and to listen to speakers explain a mind-numbing amount of information. This is a recipe for information overload. Further, it ignores the psychological reality of “the forgetting curve” where new information is quickly lost without ongoing review or application. Therefore, board onboarding must be a journey with information and engagement dripped over time rather than an event. Great onboarding also uses multiple methods of conveying information to maintain energy and adapt to various learning styles. Therefore, craft an eight-week cadence that not only includes a board manual and formal presentations but also integrates pre-reads, site visits, discussions, case studies, patient stories, on-demand digital learning, access to a digital document library and other tools, as well as opportunities for practical application of information shared. Ultimately, the onboarding journey should not only educate but also inspire and motivate each new member.

Illuminate Mission

Board members are called to safeguard and advance the organization's mission, so a board member's understanding of and passion for the mission is a linchpin of effective engagement. Thus, organizations must add richness and context to their mission story. An acute care hospital doesn't just exist to address illness and injury; it is an anchor in the social fabric of the community with deep commitments to serve people from all walks of life regardless of ability to pay. Digging deep into the societal implications of the hospital's mission and its legacy of service allows board members to embrace a deeper sense of purpose. Illuminating mission also enables board members to understand the alignment between the hospital mission and their personal values and intentions to affect positive change.

Unpack Expectations

How a board member can add value should be crystal clear. Too often, the only quantifiable expectation conveyed is around meeting attendance—which is a very narrow slice of the contributions expected and required of each member. Orientation should explore board roles and responsibilities in a clear and specific manner with examples of what excellent performance looks like. Information should also delineate between the legal and fiduciary roles of board governance and individual expectations for volunteerism.

Create Connections

The quality of relationships between board members has real implications. The accumulation of interactions shapes the inclination and capacity of each board member to foster trust and to engage in productive collaboration with others. That's why cultivating positive working relationships between board members is a legitimate onboarding issue. Board onboarding should not only include social niceness to make new members feel welcome and valued—such as a personal greeting and note of thanks for agreeing to serve from the board chair—but also support systems to allow leaders to comfortably enter the board arena. For example, there is value to assigning a current board member peer ally to share information about board work and dynamics, to answer questions in a comfortable setting prior to the first board meeting, to have a friendly face when walking into the boardroom, and to facilitate check-ins during the first year.

Demystify Norms

High-performing leaders don't want to misread the culture and misstep. So, while culture can feel more nebulous to address, it's worth going there. Board members must understand positive and productive debate and dissension are valued, so they should not

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hesitate to explore issues or ask tough questions. New members should understand that healthcare is a complex environment that demands agility, adaptability, and conscious courage to speak up when things are unclear. Board members should also be briefed on how the organization makes decisions as well as that once decisions are made by the collective board body, every board member is expected to support those decisions. Understanding simple normative behaviors, communications standards, and decision-making practices can enable a new member to engage instead of feeling tentative.

Key Takeaways

- **Make onboarding a journey rather than an event.** Spreading learning over time helps ensure new board members retain the information and fully understand practical applications.
- **Use multiple methods of conveying information** to maintain energy and adapt to various learning styles.
- **Illuminate the mission by adding richness and context to your mission story.** Digging into the societal implications of the hospital's mission and its legacy of service allows board members to embrace a deeper sense of purpose.
- **Clearly define board roles and responsibilities**, providing examples of what excellent performance looks like.
- **Cultivate relationships between board members from the beginning** so that new members feel comfortable entering the board arena. For example, assign a seasoned member as a mentor for the new member to help support them through their first year on the board.
- **Don't skip over culture.** Discussing normative boardroom behaviors and decision-making practices upfront will enable new members to engage quicker.
- **Ask about fit during onboarding.** Ensure that the leader still desires to move forward in the role and is willing to put in the time and effort needed to add value to the board.

Enable Exits

Serving on a healthcare board is not for everyone. Both the complexity of information and time requirements are significant; therefore, fit is crucial. However, there is often no "escape hatch" for leaders who realize during onboarding that board service is not

actually a good fit for them. While it would be highly inconvenient for someone to quit once they have been approved for and have accepted the position, it is much better to have someone opt out during onboarding than to carry them on the board without the willingness or ability to serve. Thus, there is value to continuing to ask about fit at each stop on the onboarding experience to ensure each leader desires both to go forward and to deliver value requisite with the demands of the role.

There is no reason to settle when it comes to providing board members with an optimal introduction to the organization, so governance support staff (working with the board chair and CEO) must be unabashed in taking the time needed to properly educate and integrate each new board member. The artful blend of sharing information and building social connections as someone joins the board has repercussions for not only that individual member but also for the culture and effectiveness of the board as a whole. Thoughtful experience design alongside an adequate investment of time for learning and affirmation can have endless results.

For more onboarding tips, view The Governance Institute's board orientation resources at www.governanceinstitute.com/boardorientation.

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