



ONBOARDING

Equipping Your Foundation Board for Success

How are you equipping your board members to successfully elevate your mission at a time when it is more important than ever? Leadership volunteers serving on health care foundation boards have significant responsibilities for advancing the mission. However, some can fall by the wayside if they lack the tools that position them to make an impact.

Philanthropy leaders must elevate governance by clearly defining and communicating board members' roles, providing effective onboarding and equipping members with ongoing tools that help elevate their work. In a year that has left many hospitals struggling to survive, philanthropic resources are being recognized as an essential alternative revenue source for health care organizations. That

means health care foundations must not only find the right people to serve on the board but also ensure these leaders are prepared for and integrated into their roles.



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Orientation, a one-time event to welcome someone into an organization, is frequently associated with a single meeting spent navigating a binder of bylaws, policies, budgets and other mind-numbing details. However, the foundation has carefully selected new board members with a passion for their mission, so why not equip them with more than just business documents? Onboarding, a series of events to help newcomers understand how to

be successful and how their work contributes to the overall mission, is the way of best engaging new members.

Whether implementing virtual or in-person, socially-distanced meetings, it is vital to offer an impactful and ongoing experience to ensure you retain and continuously engage the board members you have worked so hard to secure. Take the approach that provides fulfilling, meaningful experiences to connect new members to the organization's mission, purpose, culture and stories. Spotlight key executives—such as the CEO or clinician leaders—to illuminate the aspirations for transforming care within the organization and beyond. Prepare them with facts, stories and the understanding to be confident and compelling advocates in the community. Provide meaningful touchpoints across the first year of their tenure to ensure they are embraced and engaged by the organization. Shifting from an orientation day to continuous onboarding goes a long way toward educating, engaging and activating new members.

Here are a few onboarding elements to consider:

- **Start.** Send the organization's mission statement, history, annual report and case(s) for support before the first meeting. A follow-up call can answer any initial questions.
- **Connect.** The first meeting should be mission-driven. Start with a welcome from the CEO followed by a high-level overview of his/her vision and organizational plans. Have a philanthropy executive share goals of the foundation. Ask clinical staff to speak about organizational progress funded by philanthropy and have a family member share their powerful story and gratitude. A team member can discuss the elevated connection of strategic priorities and donor passion. Conclude with a tour of the hospital, which currently may be prerecorded. Board members should complete their day excited about their involvement in the mission.

- **Inform.** The next meeting should review how the board governs the foundation and should include the chairs of the board and governance committee. Board roles and responsibilities should be outlined alongside a provided manual with all documents necessary to help new board members navigate the waters. Refer to documents, but do not read through them. Members can do this later and ask questions as needed.
- **Partner.** Pair each new board member with a current member to help them understand the ever-changing health care world and culture of the board and organization. Providing new members with a peer mentor can get their questions answered quickly and less formally.
- **Communicate.** A week before the first official board meeting, host a private meeting with the new members, board chair(s) and philanthropy leaders to discuss short-term and long-range plans, as well as budget and questions.
- **Continue.** Philanthropy leaders should have ongoing, informal meetings with board members. While it is important to ask for ideas, share the impact of philanthropy, solicit feedback and help with vital community connections, it is also important to continuously ensure board membership remains a good fit for all.

Orientation is not a box to be checked off. Investing time in a robust onboarding process ensures a good start and continues to build strong relationships for the future. Quality onboarding provides board members with organizational knowledge, cultural insight and inspiration that creates positive impact across the length of their service and beyond.

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