

Seven Steps to Designing an Effective Governance Education Process

A successful governance education process requires commitment, collaboration and consensus. Below is an outline of how a board of trustees may design a process that will ensure optimum development of leadership knowledge and effectiveness:

Step One. Define the broad issues about which every board member needs to have a common understanding in order to be a high-performance trustee. The hospital's current strategic plan should serve as a basis for determining the most critical board education topics and current health care trends impacting board and, ultimately, hospital success.

Step Two. Assess each individual trustee's awareness and understanding of the issues and situations likely to come before the board in the coming months. This may be done through a board self-assessment, a simple survey, or in casual one-on-one conversations, typically between individual trustees and the board chair and/or CEO. The individualized knowledge assessment should help determine the areas where pinpointed education should be focused to most quickly get trustees "up to speed" on the issues and decisions for which they are fully responsible.

Step Three. Assign an experienced board colleague to work closely as a mentor with newer trustees to help them understand issues, questions, nuances, etc.

Step Four. Develop a 12-month or longer "curriculum" of topics that are essential to effective governance, and determine the most appropriate resources to assess or deliver the information. Ensure that trustees are actively involved in the selection of topics, and that the methodology for presenting the information is conducive to trustee learning styles. Delivery methods may include in-person presentations, facilitated discussions, online presentations, reading materials, and more.

Step Five. Leverage the improved trustee knowledge not only for board discussion and decision making, but also through coordinated outreach, including legislative advocacy and connections with the local community through trustee involvement in community activities, and formal and informal community discussions and presentations about the organization and the challenges it faces.

Step Six. Continuously refine and improve the process. Conducting a regular governance practice and performance self-assessment is one method to measure year-over-year improvements in board understanding and education effectiveness, and determine potential "knowledge gaps" that still exist. Successful self-assessments enable boards to identify "leadership gaps," or areas in which the board has the greatest potential for improvement. The board self-assessment process identifies these gaps, and facilitates the development and implementation of initiatives and strategies to improve leadership performance. Through an effective, well-developed governance self-assessment process, growth opportunities can be realized, education can be pinpointed to unique governance needs, recruitment of new trustees can be undertaken with increased confidence, and long-range planning can be conducted within a consensus-based framework with everybody on the same page.

Step Seven. Ensure an effective onboarding program for new board members. A strong onboarding program and warm welcome to the board are critical to the success of new trustees as well as to the board's success as a cohesive governing body. Initial

onboarding information should include an introduction to the organization, its history and recent evolution, bylaws, committee charters, board member backgrounds, fundamental roles, responsibilities and governance practices, trustees' role in community and legislative advocacy, etc.; key personnel; briefings on services and programs, and their relationship to the mission; education about the health care environment and its implications for the organization; a review of the most recent governance self-assessment and the resulting improvements to governance; a review of the most recent community needs assessment and community benefits report; and an overview of the strategic plan and its rationale. The onboarding process should not be a cursory one-time event. It should be a well-planned, coordinated process that is carried out over several months, with the objective of preparing new trustees as thoroughly as possible to successfully carry out their leadership accountabilities.