

# Trustee Insights

## BOARD ORIENTATION



## Creating Excellence in Hospital Oversight

How strategic onboarding and continuous learning drive stronger hospital board performance

**N**ew hospital and health system trustees embrace their important roles with energy, enthusiasm and dedication, and are eager to learn how they can be effective and impactful board members. A comprehensive orientation can take advantage of this energy and ensure new trustees are educated on the needs of hospitals and health systems and the broader health care landscape. Moreover, board orientation is a strategic investment that directly affects the organization's quality of oversight,

speed of decision-making and ability to navigate risk in a complex health care environment.

### Two essential components of effective governance

Effective governance requires two distinct but connected investments: a strong onboarding experience that equips new trustees in their first months of service, and continuous education that sustains board effectiveness throughout trustees' tenure. When orientation and educa-

tion are insufficient, boards risk slower ramp-up for new trustees, uneven accountability, compliance vulnerabilities and missed opportunities to provide timely, informed strategic guidance.

In December, the American Hospital Association released Chapter Three of its [2025 National Governance Report](#) to the health care field. Chapter Three highlights trends in trustee job descriptions, formal board orientation processes for new trustees, board mentoring, formal board orientation for board leaders and continuing education.

According to the report, most boards (81%) reported having a formal orientation for new board members. Top elements of the orientation include meeting with the CEO and/or senior leadership team (93%), receiving health care governance orientation (84%), participating in a facility tour (75%) and orientation to the system or hospital (75%).

### The importance of clear roles and expectations

Understanding roles and responsibilities is another important component of orientation. Job descriptions are an easy way to establish clear expectations, define responsibilities and outline time commitments and required skills. They also serve as a reference for performance evaluation and help new members understand their specific roles and how they fit into the organization's

larger goals. Almost one-third of all boards indicated they did not have job descriptions for any board role type. Without clear role definitions, boards risk ambiguity around fiduciary responsibility, expectations and performance accountability.

The report highlights two key areas of opportunity for improvement, as many boards report they have no formal orientation, nor do they have a formal orientation process for new board chairs. These gaps are notable, as orientation is critical to creating effective board members and vital for board chairs who play a pivotal role in setting culture, guiding discussion and partnering with executive leadership.

### The need for ongoing trustee education

It is generally accepted that it takes one to three years for a new member of a health care board to feel knowledgeable and ready to contribute at the highest level. In today's rapidly changing health care environment, organizations need the full board to function at maximum

capacity as quickly as possible and throughout their tenure. Thus, a comprehensive orientation process must be complemented with ongoing education. Hospitals and health systems approach continuing education in a variety of ways. According to the report, system and subsidiary hospital boards provide quarterly education to their trustees, while independent hospitals do so on an annual basis. The most frequent type of continuing education across all hospitals and health systems is a briefing from legal counsel or others on compliance issues.

### Perspective from the field

Laura Orr, senior partner and global board advisory leader with WittKieffer, was invited to comment on the report's findings related to board orientation practices. "Orientation is necessary but not sufficient to support long-term board effectiveness," observed Orr. "Ongoing education is essential to ensure trustees are informed, engaged and capable of leading in an increasingly complex health care

environment."

Orr suggests expanding development opportunities, such as separate learning sessions, retreats, external governance education and self-paced learning, to grow higher-functioning boards.

### Looking ahead

AHA Trustee Services offers tools and resources for further board development, such as [Health Care Trends that Demand the Attention of Boards and Executives](#). New trustees are also invited to explore [Boardroom 101](#) to learn more about their responsibilities.

The question for boards is no longer whether orientation and education matter, but whether their current approach is sufficient to meet today's governance demands and tomorrow's uncertainties.

As Orr notes, "Intentional and strategic investment in board members' onboarding and ongoing education can yield high returns for the hospital or health system, for the board and for the individual trustee."