



IMPROVING THE FOUNDATION ONBOARDING EXPERIENCE

Today more than ever, philanthropic resources are 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 effectively prepared for the role and integrated into the life of the organization.

Current board orientation approaches often elicit groans and eye-rolling. Typically, a single meeting is spent navigating a thick binder and absorbing bylaws, policies, budgets and other mind-numbing details of the organization. However, since the foundation has carefully selected new board members with a passion for the mission, why would the focus of orientation be almost exclusively on reviewing business documents?

It is time for the foundation board governance committee to recalibrate *orientation* to instead offer an impactful and

ongoing *onboarding* experience. This new approach provides fulfilling, meaningful mission experiences to connect new members to the organization's mission, purpose, culture and stories. It pairs them with a current member mentor who can acclimate them to the board culture, make them feel welcome and explain board activities. It spotlights key organizational leaders—such as the CEO or clinicians—to illuminate the organization's vision and aspirations for transforming care. It prepares them with the understanding, facts and stories to be confident and compelling advocates in the community. It provides meaningful touchpoints with new members across the first year of their tenure to ensure they are embraced and engaged by the organization. Ultimately, shifting from orientation to onboarding goes a long way toward educating, engaging and activating new members.

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Here are a few onboarding elements to consider:

- **Start with the basics.** Send the mission statement, history of the organization, annual report and case for support to set the stage prior to the first meeting.
- **Connect to Mission.** The first in-person meeting should be mission-driven. Start with a welcome from the CEO followed by a high-level overview of his vision and organizational plans. Then, have the VP of Philanthropy share the goals of the foundation. Have clinical staff speak about organizational

progress funded by philanthropy. Consider the ability to have a family member share their powerful story and express gratitude. The meeting should conclude with an in-depth, inspirational tour of the hospital. This day should be a moving experience that captivates the new board member.

- **Inform on Governance.** The next meeting should show how the board governs and leads the foundation and should include the chairs of the foundation board and governance committee. Discuss board roles and responsibilities and provide a manual with all documents necessary to help new board members navigate the waters.
- **Partner with Peers.** Pair each new board member with a current board member mentor to help them understand the complicated health care world and the culture of the board. Providing new board members with a peer relationship can get their questions answered quickly in a less formal setting.
- **Collaborate with Leadership.** A week before the first official board meeting, host a private meeting with the foundation board chair and VP of Philanthropy to discuss the strategic plan, budget, long range plan and to answer questions. Also, see if foundation board service remains a mutual good fit.
- **Communicate Constantly.** The VP of Philanthropy should have ongoing, informal meetings to check in with new board members, ask for ideas, share the impact of philanthropy and solicit feedback.

Orientation is not a box to be checked off on a "to do" list. Invest time in a rich and robust onboarding process to get each new board member off to a good start and to build strong relationships for the future. Quality onboarding provides new board members with organizational knowledge and cultural insight that can inspire and motivate them across the length of their service and beyond.

For Board Discussion ↴

Do we have an impactful onboarding process to support board engagement and performance?

How can we enhance and expand the onboarding process to make it an even better experience?

Does our board drive the onboarding process or do we primarily leave it up to management?

Am I willing to be the first one to step up and be a mentor to a new board member?

About the Author:

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