



Effective board orientation for sustained organizational success

An effective orientation program for new healthcare trustees is crucial to an organization's success. This rapidly changing and challenging environment demands that hospitals and health systems have knowledgeable and prepared trustees at the helm. Through effective use of structured and planned board orientation programs and ongoing education, trustees are better equipped to fulfill their crucial leadership roles and governance responsibilities.

Board orientation helps new board members

- understand and navigate the organization;
- understand roles and responsibilities;
- build and strengthen relationships; and
- accelerate learning.

It can help the whole board by

- enhancing board effectiveness;
- equipping the board for stronger governance;
- improving board dynamics;
- reducing risk; and
- cultivating a more engaged, effective and sustainable board and board culture.

Key issues that should be addressed include

- *Organizational information:* History of the organization; mission, vision, values; organizational chart
- *Policies and procedures:* Bylaws, duties and job descriptions; current strategic plan; financial statements, ratios and goals
- *Board-specific information:* Trustee expectations such as attendance and education; roles and responsibilities; fiduciary and legal oversight duties; conduct of meetings; conflict of interest issues
- *Healthcare information:* Background on the current national, state and local healthcare environments; definitions of [key healthcare terms](#); overview of major health policy and operational issues, including finance and quality and patient safety; future trends; significant issues and decisions made in the past 12 months

How should orientation be conducted?

Boards can take various approaches, including formal educational sessions, social gatherings to meet existing trustees and senior leaders, pairing new trustees with experienced board members who serve as mentors, using a trustee manual and observing board and/or committee meetings. Some boards supplement their orientation by sharing certain areas of their organization's website and/or board portal.

What should be the duration of a board orientation program?

The series of activities that comprise your orientation program should last for the trustee's first year. However, orientation should not stop there. Most trustees are not healthcare professionals, and it takes time and ongoing education to learn about the many health professions, local healthcare needs and how healthcare trends impact the organization. Board members can stay abreast of what is happening in healthcare through board retreats; an educational item on each meeting agenda; background reading; surveys of board member interests and concerns; and participation in local, state and national conferences.

How can HTNYS help?

Attend the pre-conference session, [New Hospital Board Member Orientation Program](#), at this year's [Trustee Conference](#) on Sept. 11. This program will provide a tailored scan of New York's hospital system, an overview of leading governance practices and the board's role in quality and patient safety, and a Q&A with content experts and veteran hospital board members.

Also, check out the [Board Orientation Resource Library](#) on our website for resources.

Information for this article was obtained from:

- [HTNYS Boardroom Basics: What Every Healthcare Trustee Needs to Know](#)

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HTNYS' monthly *Trends* updates provide trustees with information about emerging developments in governance and healthcare. *Trends'* timely statistics and insights help trustees fulfill their roles and responsibilities while adapting to the changing environment.