

Attaining a Seat at the Table: Process, Preparation, and Potential

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Board members provide critical intellectual capital and strategic resources to power organizational success and strengthen communities. Nurses have the leadership competencies, knowledge, skills, and experience required to serve on Boards. Understanding board service, and how to get started, we help nurses attain a seat at the table.

As the nation's largest healthcare occupation and America's most trusted profession (Brenan, 2018), registered nurses are uniquely qualified to help address some of healthcare's biggest challenges – from patient safety to reducing costs and increasing access to healthcare. It simply makes good business sense to have the nursing perspective represented in all places where decisions are affecting health.

Board members provide critical intellectual capital and strategic resources to power organizational success and strengthen communities. Nurses have the leadership competencies required to serve on boards. Nurses are valuable members of society equipped with the knowledge, skills, and experience to get things accomplished, motivate individuals, and engage diverse voices in efforts to design the best solutions for a variety of challenges. Nurses are equipped with key attributes, such as a broad spectrum of credibility, awareness of community needs, and the ability to identify and solve problems, to attain a seat at the table.

So, Where Do I Start?

Successful board membership begins with the right “fit.” The Nurses on Boards Coalition believes we must strive to always have the *right nurse* on the *right board* for the *right reason*. In that light, as nurses, we must begin by first selecting to serve on the board of directors of an organization with a mission and values closely aligned with our own. Each of us has an intrinsic

set of interests in things that excite us and make us want to devote our time, talents, and treasures to the cause. Only if we do the research upfront and identify an organization that fulfills that internal match can we truly be successful as board members. For example, if our passion is providing for the care of the homeless that might be a great place to look. Or, if our heartstrings pull more to helping animals, perhaps the local animal shelter might be more desirable for. Whatever area calls to you will most likely be the best match.

Many different types of boards exist and identifying the right type of board for your interests, time commitments, and often financial commitments (whether they be large expectations or small contributions) is important. Many nurses start community service by joining a community nonprofit organizational board. These board experiences provide nurses new to the role of board member with the ability to hone board competencies and get comfortable bringing ideas to the discussion, raising questions as to why a specific decision is suggested, and utilizing excellent communication and strategy skills to help the group discussion land in the best place.

Other service roles, such as serving as members of the board of for-profit organizations or local or state taskforces or councils are other great places to bring the nursing voice to the table. Research the organization and talk with its leaders and other community members or stakeholders to be absolutely sure the organizations over which the board governs are the right fit for you.

Contacting Potential Organizations

After narrowing the area of interest and identifying a shortlist of potential organizations, the next step in the process involves making contact with the organization and its leaders. Some organizational websites are much more in-depth and include more information about the organization and its mission, leadership projects, and financial situation than others. Regardless of the detail included in the organizational website, it is important to glean as much information as possible.

Most nonprofit organizations have detailed websites that include their mission and values. If the mission and values raise red flags, a deeper examination is warranted. Successful board membership only occurs when the mission and values closely align. Being a board member makes one an ambassador of that organization who must stand tall in support of all things the organization stands for both internally and externally.

Once comfortable the organization appears (at least initially) to match your interests and values, inquire about the process by which they add new members to the board. Contact the board chair or the organization's executive officer and ask to discuss the organization and its governance. Most organizations are open to this discussion since they are seeking board members whose passion and values match that of the organization.

The Selection Process

To prepare for the board selection process, familiarize yourself with the application/nomination/selection process of your targeted board, and then develop an intentional pathway to a board seat. Develop your strategic pathway through:

- Networking
- Leveraging your network
- Acquiring potential nominators

Develop and strengthen relationships with nomination/selection facilitators; let them know you are willing to serve. Although similarities exist, differences occur as well, therefore familiarize yourself with the board's application/nomination/selection process. The process may include

submission of your name, title, and contact info; current CV, bio, or résumé; and application.

Keep in mind board leadership requires a broad knowledge about various topics beyond nursing. You must be willing to assume the role of posing questions that generate ideas for others to consider. You must also have the ability to promote disruptive innovation while understanding the potential consequences of all board decisions. Commit to leading on behalf of the larger public. Become a community influencer; be a societal leader.

What to Expect in the Boardroom

You are selected to serve! Celebrate! If you are less than familiar with the general roles, responsibilities, and expectations of your board's organizational structure, operations, financial reporting, legal compliance, and technological advances, now is the time to clarify your role and responsibilities and shore up if needed. Additionally, allow technological savvy to be a self-descriptor – seek assistance if needed. Remember, first impressions still matter whether you are attending an interview for a board position or your first board meeting. The importance of updated business attire, a proper handshake, and professional business or personal card cannot be understated.

Board Roles

Key roles serve to enhance long-term stakeholder/stockholder value and uphold the board's fiduciary role which extends beyond its financial oversight and encompasses three legal duties that must be performed by all members of the board.

The *Duty of Care* focuses on the board's process of decision-making and describes the level of competence expected of a board member in exercising reasonable care as stewards of the organization. Requirements to fulfill the Duty of Care include:

- Making informed decisions
- Conducting due inquiry

Table 1.
One Nurse's Experience

The process began with a letter of invitation, followed by a telephone call. Once the invitation was extended a flurry of paperwork ensued.

- *The application was completed.* The application requested data such as personal, educational, employment, and legal information to include civil suits and judgments, liens, bankruptcy, criminal history as well as inquiries about personal finances, background checks, civic/professional membership, professional licenses, military information, ethnic information, political affiliation, and professional/character references.
- *A tiered interview process followed.* A telephone interview was conducted as well as a face-to-face with an individual followed by a diverse group of board leaders. The nurse researched the organization before the interviews so responses to inquiries would be well informed. She brought a copy of her one-page bio, and dressed professionally. First impressions count. She used the interview time to concentrate on her strengths, highlighting accomplishments and learning experiences.
- *An offer to join the board was extended.*

Action Items for Board Members

- Attend meetings prepared: Do your homework.
- Participate: Ask constructive questions/seek additional information.
- Think strategically: Consider quality, safety trends, and performance.
- Utilize appropriate skills and experience to challenge assumptions and ensure alternatives are explored before accepting recommendations.
- Express a dissenting opinion or negative vote as appropriate.

The *Duty of Loyalty* requires board members to safeguard the organization's business interests and act faithfully in the best interests of the organization. Requirements to fulfill the Duty of Loyalty include:

- Acting in good faith without self-interest when making decisions.
- Preserving the confidentiality of corporate affairs.
- Avoiding conflicts of interest.

Action Items for Board Members

- Give undivided allegiance when making decisions affecting the organization. Do not discuss

confidential board deliberations/actions outside the boardroom.

- Avoid impropriety with disclosure of affiliations.
- Never use information obtained for personal gain.

The *Duty of Obedience* requires board members to comply with applicable laws, rules, and regulations as they act faithfully to carry out the organization's mission. Requirements to fulfill the Duty of Obedience include:

- Honoring the terms and conditions of the organization's mission, bylaws, policies, and procedures.
- Acting within the scope of their authority under the corporation's articles, bylaws, and applicable laws.
- Focusing beyond the organization's financial health to safeguard its charitable purpose.
- Preserving the organization's assets held in trust for the community.

Action Items for Board Members

- Educate yourself on the organizational goals; act consistently with them.
- Ensure you understand key laws and regulations and their implications for organizational governance.
- Become aware of board policies and procedures.
- Ensure adequate resources and manage funds to fulfill the mission.

Board Responsibilities

A board's primary responsibility is to guide and direct an organization to ensure it meets stakeholder needs. Three key responsibilities include establishing (or revisiting at regular intervals) the organization's vision, mission, and values.

Vision statements are usually broad, inspiring, and future-focused. They guide the organization for many years. Vision statements describe what an organization is striving to become to meet stakeholder needs and expectations.

Mission statements lead organizations to meaningful strategies and goals. They energize stakeholders and position the organization as unique. Mission statements describe the current

primary work of the organization in service of stakeholder needs and expectations.

Values statements are consistent with the mission and vision and drive action that supports them. Values statements describe the core behaviors that guide stakeholder relationships, defining how the organization will act.

Other key responsibilities include developing policies and procedures that provide a framework for the organization's actions and decision-making; setting chief executive officer compensation; and setting, monitoring, managing, and evaluating directional goals toward achieving specific levels of performance in areas such as financial health, quality programs and services, safety, building a competent board, ensuring legal and ethical integrity, and enhancing the organization's public standing.

Board Readiness

In addition to operating with clarified board roles and responsibilities, shore up, if needed, your board readiness by acquiring proficiency in governance matters, tweaking technological savvy and updating personal/professional appearance (e.g., business dress, handshake, and a business or personal card).

Some fundamentals (core competencies) of board governance and fiduciary responsibilities include:

- How to address the presiding officer.
- The expectation of an agenda (minutes, finance report, committee reports).
- Working knowledge of Robert's Rules.
- Familiarity with organizational structure and tax designation.
- Fiduciary responsibilities to include fundraising expectations.

Conclusion

With clarified board roles and responsibilities for optimal performance, fortified with demonstrative board readiness and core competencies in the areas of governance, fiduciary responsibilities, and fundraising expectations, nurses are well prepared to serve in the boardrooms of all levels of America's organizations where they can success-

fully demonstrate their passion for improving and maintaining healthy communities nationwide.

Please join this important work! Bring your voice to the table to ensure the health and well-being of America is improved. For additional information regarding preparation and support for board service or to register your board service, please visit www.NursesOnBoardsCoalition.org. There is a place at every table for a nurse. Please pull up a chair and take your seat! \$

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