

## Prepare and Pursue Board Opportunities: A Practical Guide for Nurse Leaders to Serve on a Board

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*Getting started as a nurse leader on a board is a matter of using familiar skills of planning, managing, navigating, and building healthcare solutions. Once adequately prepared for board service, nurse leaders usually find a great deal of intrinsic value gained through the dedication of their time, talent, and treasure to a cause that closely matches their values and interests.*

Nurses belong everywhere decisions are made. Since the 2010 Institute of Medicine report recommended nurses bring their unique disciplinary voice to the board table, over 7,000 nurses have registered their board service with Nurses on Boards Coalition (NOBC) (n.d.). The number of nurses interested in board service continues to grow. Nurses often question whether they are ready to serve on a board and how they can gain confidence to fuel that first board application. The purpose of this column is to provide a practical guide to empower nurse leaders in seeking board service.

### How Can I Use Passion, Service, and Networking to Find the Right Board Fit?

A board works together to advance the mission and values of the organization it serves (Harper & Wray, 2019). Filling a board seat for an organization whose mission matches your passion is a great place to start. Many nurses find it rewarding to engage in initiatives that are important to them through board involvement. A good first question to consider is where do you see yourself weighing in or lending your experience and knowledge? While nurse leaders are a natural fit for health-related nonprofit organizations, nurses come to the board table with real lives packed with touchstones to organizations within the community. Each of these touchstones is a place where nurse leaders can share their professional skills and influence communities.

Once an organization is identified, becoming familiar with the people in the organization and the people the organization serves is important (Benson & Harper, 2018). This means making time for meetings and events that support the organization's mission. In some situations, this comes easily because events flow naturally from familiarity with the work that is currently being done with the organization. In other cases, a nurse interested in becoming active on a board may need to do some research regarding the activities that support the organization. This can be done online or through telephone calls and talking with members of the organization and its board. Another leadership strategy for gaining this information is to ask for information from a colleague who may be acquainted with the organization. A unique challenge many nurses leaders face is time. Here, the support of family, colleagues, and employers can be beneficial. Many organizations are supportive of their nurses being involved in the community and provide support for schedule flexibility when they are aware that a nurse is serving on a board, providing for a win-win situation for the board, the nurse leader, and the nurse's employer.

Building relationships in the workplace and within the organization of interest is an important part of finding a board seat. Networking among and within professional organizations and community activities helps nurses grow social capital that is important in advocating for an organization and its mission (Harper & Wray,

2019). These relationships help board members connect the dots within the community to build recognition and support for the organization and provides for recognition of their interests.

While building relationships, an essential part of becoming ready for that first board seat is to perform an inventory of strengths and weaknesses. No one comes to a board with every skill needed to do the job (Benson & Harper, 2018). Nurses often think that expertise in governance, finance, and operations of the organization are all needed to assume that first board seat. While it is important to grow these skills, an established board offers full orientation and mentorship to new board members, and many resources to assist nurses in developing these critical skills are available on the Nurses on Boards Coalition website ([nursesonboardscoalition.org](http://nursesonboardscoalition.org)).

### How Can I Harness Relationships and Self Awareness to Fit In?

After a board of interest is identified, contacting the presiding officer of the board or the chief executive officer/executive director of the organization to inquire as to whether there will be a board seat available is appropriate. Alternatively, a member of the board may know you and invite you to consider an open board seat. At that time, you might be asked to supply information about the strengths you bring to the board. Potential board members must be prepared with a one-page personal and professional biographical outline of the skills they would bring to the board. This document must be only one page in length and include a short overview of the person's professional competencies for board service, educational background, any other board experience, and personal contact information (NOBC, n.d.). Often an interview with a board member or a nominating committee for the board is the next step. During the interview, you can ask questions about how the board will prepare you to fulfill your obligations as a board member. Potential questions to ask during that time include:

- When and what kind of orientation to the board is provided?
- How do my strengths complement the strengths of other board members?
- Does the board offer mentorship with an

experienced member during the initial term of service?

- How will I be evaluated as a board member?
- What opportunities will I have to assess overall board performance?

Additionally, this is an opportunity to ask what other requirements exist for board members. For example, some boards are very involved in fundraising or community events, and board members must be fully aware of these expectations before joining the board.

To establish if the orientation for the board meets self-identified needs, an evaluation of comfort level with the operations of a board is helpful. Nurse leaders are accustomed to managing resources in an environment of regulation and legal considerations. As such, they become a natural fit for most board member responsibilities. To put this leadership in context, there are many opportunities for board education available and some of them offer continuing education credit. For example, NOBC, in collaboration with Sigma, provides joint board training. Boards may contract for this service, which provides professional educational sessions in governance for all types of boards. These general board educational experiences can reinforce and frame the nurse leader's comfort with Robert's Rules of Order, general governance considerations, and overview of finances for monitoring an organization's performance.

### How Do I Maintain Financial and Legal Fitness?

Many nurse leaders are concerned about becoming familiar with the financial responsibilities and liabilities associated with board involvement. Orientation and continuing education in these areas are important. A key to gaining experience in this area is seeking an initial board experience where you are more familiar with the financial accounting associated with that board (Harper & Wray, 2019). For example, many nonprofit organizations provide monthly or quarterly balance sheets with explanations by the executive director. These tools and reports are similar to reports nurse managers and directors receive routinely. Internal and external audits are performed and reported to the board in accordance with the laws that govern state and federal tax filing. Many leaders are familiar with hearing about audit results at the end

of the year. Privately held and publicly traded organizations have extensive accounting, oversight, and audit requirements. Participation in boards of this nature requires gaining comprehensive financial and legal understanding. Becoming familiar with these business and legal requirements before applying for a board seat in any organization is an essential piece of personal development. These financial skills may be more closely linked to nursing leadership roles in the C-suite of health systems, insurance companies, etc.

The discussion of finances leads many to consider liability questions. Nurse leaders are accustomed to liability in practice. Nurses have responsibility in their practice to act within the standard of care and in accord with their state's licensing requirements and Nurse Practice Act. They must ensure care is provided amid federal and state regulations and laws. Just as nurse leaders provide for compliance in care, all board members have legal responsibilities to the organization they serve. These responsibilities include making decisions in the best interest of the organization's mission, making prudent decisions on behalf of the board by being present and well informed at all board and committee meetings, and asking questions when necessary to clarify information. An in-depth board orientation will assist new board members in becoming familiar with these duties.

Nurse leaders should be prepared to disclose any conflicts of interest they may have in decision-making on an annual basis. These conflicts can arise from financial or governance responsibilities outside the organization. They may be employer, personal, or family related. When in doubt of whether activities could be considered a conflict, a potential board member should always disclose the information and seek the advice of legal counsel, particularly when reimbursement for health-related services is of concern.

To cover the liability associated with board work, directors' and officers' insurance is available. Many boards pay for this insurance for board members, and potential board members should inquire if this is provided. There are many considerations regarding whether board members should also carry private insurance. These considerations arise from the type of board served on and the personal situation of the nurse. A good rule of thumb as a professional is to maintain a relationship with an attorney familiar

with the unique disciplinary considerations of nurses and the regulations of the healthcare environment. The American Association of Nurse Attorneys offers a list of available attorneys who are also nurses. This organization can help locate resources by state.

### **How Can I Develop My Voice on the Board?**

The power of nursing is seen in the day-to-day decisions made in the course of practice (Cleveland et al., 2019). No other profession meets people during their most vulnerable experiences and supports them through the health continuum across the thresholds of communities, hospitals, long-term care facilities, and support groups. This position and ability to appreciate and respond to challenges is the unique voice of a nurse. Nurse leaders navigate the complexity of health, regulation, and financial challenges daily in providing solutions to complicated issues. A professional board voice can be developed by listening to the issues the board discusses and sharing the unique disciplinary perspective and competencies the individual nurse brings to the topic.

Meaningful board contributions arise from well-prepared board members (Harper & Wray, 2019). A great rule of thumb is to review board meeting materials well in advance of the meeting. If there is an unclear item, this allows for the opportunity to look for the answers through the evidence provided in previous board meetings and materials, other board members, or personal research. Also, when in doubt, it is advised to contact the board chair to ask for clarification of an issue before the board meeting. Once that information is gained, it can be used to prepare and ask thoughtful questions during the board meeting.

Board members must always be prepared to advocate for the organization on whose board they serve. A board voice is not only heard in the board room but the community as well. Be familiar with the board's mission and develop a 1-minute speech to share the work of the organization you support. Be prepared to serve as an ambassador of the organization your board service represents.

Board members need always to be knowledgeable of the issues their organizations face and be able to speak to them with clarity. Take time to refine and grow your knowledge of

the matters your board oversees. By developing clear language around these issues, a reliable board member can help problem solve while advocating for the organization's mission.

### Are You Ready to Engage in Board Service?

Getting started as a nurse leader on a board is a matter of using familiar skills of planning, managing, navigating, and building healthcare solutions. Clear communication builds networks of influence that nurse leaders can use to gain the recognition needed first to get invited to the board table and then to engage in advancing that organization's mission. Self-reflection and self-awareness, coupled with well-organized preparation, astute practical questions, and continuous professional development in areas the nurse may see as developmental, are lynchpins for nurse leaders to make meaningful contributions throughout their board experiences. Once adequately prepared for board service, nurse leaders usually find a great deal of intrinsic value gained through the dedication of their time,

talent, and treasure to a cause that closely matches their personal values and interests. \$

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