

**Nurse Leaders in the Boardroom: The Skills You Need
To Be Successful on a Board**

Webinar Summary

May 16, 2012

Participants:

Susan Hassmiller, PhD, RN, FAAN, Senior Advisor for Nursing, Robert Wood Johnson Foundation; Director, Future of Nursing: Campaign for Action

Susan Reinhard, PhD, RN, FAAN, Senior Vice President, AARP Public Policy Institute and Chief Strategist, Center to Champion Nursing in America (CCNA)

Antonia Villarruel, PhD, RN, FAAN, Associate Professor and Director of the Center for Health Promotion, University of Michigan; Committee Member of the Future of Nursing: *Campaign for Action* Strategic Advisory Committee, Co-lead of the Future of Nursing *Campaign for Action* Diversity Steering Committee

Video Presenters:

Michael Bleich, PhD, RN, FAAN
Catherine Dodd, PhD, RN
Catherine "Alicia" Georges, EdD, RN, FAAN
Donna Policastro, RNP

Background:

This webinar was co-hosted by CCNA and the RWJF Human Capital Communications Team that focused on one of the key IOM recommendations -- that health care organizations and other groups should bring more nurses onto board positions where they can use their skills and be influential in the health care reform movement.

Both the Center to Champion Nursing in America and the *Campaign for Action* at RWJF are committed to the issue of nursing leadership.

This webinar highlighted why nurses should serve on boards, the

Across the country, there is a movement to advance the field of nursing so that all Americans have access to high quality, patient-centered care in a health care system where nurses contribute as essential partners in achieving success. This national level [Future of Nursing: Campaign for Action](#) is a result of the Institute of Medicine's landmark 2010 report on the [Future of Nursing: Leading Change, Advancing Health](#).

The *Campaign for Action's* field-based teams, the [Action Coalitions](#) (ACs), are leading this movement and are equipping themselves with knowledge gained from technical assistance provided by the Center to Champion Nursing in America (CCNA), a joint initiative of AARP, the AARP Foundation, and the Robert Wood Johnson Foundation. Such technical assistance comes in the form of webinars, face to face interactions, and other facilitated engagements with public policy leaders, content experts, consultants, and Action Coalition peers across the country.

skills and responsibilities of serving on a board, how nurses can prepare themselves and how to take the first steps. This unique presentation combines practical information with video interviews of nurse leaders who have served on boards.

As a culmination of CCNA's work on leadership, the organization developed the Toolkit - *Nurse Leaders in the Boardroom – The Skills You Need to Be Successful on a Board*. This toolkit provides a turnkey PowerPoint and video presentation that underscores the importance of nurses serving on boards and provides potential nurse board members with an introduction to the skills needed for board service and a process for taking the first steps to secure a board position.

Susan Reinhard indicated to the listeners to think about where to distribute this DVD and toolkit program to nurses in states to help them prepare for board leadership, such as state boards of nursing, schools of nursing and employers of nurses. **Reinhard** also encouraged ACs to identify what corporations would be receptive to viewing the DVD, such as businesses involved in health care technology. Consider the corporations that serve on the Action Coalitions' boards and steering committees and introduce them to this DVD.

Following this webinar, CCNA mailed one copy of the *Nurse Leaders in the Boardroom* DVD to the nurse co-lead of each AC. Included on the webpage where the DVD is archived are ideas on how you can use the DVD to educate nurses in your state on the importance of board leadership. The webpage includes sample letters you can use to introduce the DVD to your schools of nursing or state boards of nursing.

Webinar Goals:

- Understand the importance of nurse leaders serving on health care boards, the unique perspective they bring and what board service offers to nurses
- Understand the basic requirements of board service, including stewardship and governance
- Learn how to prepare and be considered for board service, including additional resources
- Learn how to present this "Nurse Leaders in the Boardroom" program to nurse leaders at state and local venues

Webinar Overview:

Hassmiller characterized the IOM report as an action-oriented blueprint on transforming the nursing profession. There are two recommendations in that report that deal with nursing leadership and an entire chapter that specifies context and direction.

One key recommendation from the report is about preparing and enabling nurses to lead change to advance health. It says that nurses should be full partners with physicians and other health professionals in redesigning health care in the United States. Another key recommendation states that nurses should take responsibility for their personal and professional growth by continuing their education and seeking opportunities to develop and exercise their leadership skills.

RWJF has a longstanding commitment to building nursing leadership capacity in management, education, research and policy through various programs, including the Executive Nurse Fellows and Nurse Faculty Scholars programs. Many of the Executive Nurse Fellows are involved in state ACs, and seven are co-leads. .

To find out more about the Executive Nurse Fellow program, visit www.executivenursefellows.org.

CCNA has also developed nursing leadership initiatives. They coordinated three pilot programs to foster board participation of nurses in Virginia, Rhode Island, and New Jersey. **Reinhard** said that CCNA convened AARP state offices and state nursing associations to create opportunities for nurse leaders and other state leaders in health care, business, education, non-profit organizations and government. In an all day event, nursing leaders were able to network with leaders in their state and participants learned how the skills that nurse leaders possess are valuable and relevant.

In her presentation of this webinar, **Toni Villarruel** focuses on helping nurses get “board ready” with a combination of preparation and inspiration.

In the presentation, she will discuss:

- ✓ Why now is a critical time to serve on a board
- ✓ Why nurses can be an asset to a board
- ✓ What is expected during board service
- ✓ Ways you can start preparing for board leadership
- ✓ A resource guide to help you put a plan into action

Interspersed with her remarks are video interviews from nurses who have served on boards. The information will provide a broad understanding of board service, not only for hospital or health systems, but for non-profit, educational and government councils and boards.

There are many reasons why the timing is particularly opportune for nurses to play a greater role on boards. The historical passage of the Patient Protection and Affordable Care Act, the fact that nurses need to be at the table to shape change and realizing the vision of quality health care for everybody will require a transformation in nursing.

Referring to a Gallup study of 1,500 thought leaders commissioned by RWJF, Villarruel said that nurses are **not** now perceived as being influential leaders in health care. Other Gallup survey data ranks nurses first among professions in trustworthiness. But, among the thought leaders, the perception is that nurses will not be influential in health care reform because they were not important decision-makers.

But almost everyone in the survey said that nurses **should** have **more** influence in every facet of health care, including planning, policy and management.

In addition, these opinion leaders believe nurses should take on more leadership in health and health care by making their voices heard, increasing leadership expectations and working to improve the perceptions of nurses.

In the video clip, **Michael Bleich**, PhD, RN, FAAN, who was a member of the IOM Committee says that nurses have a “unique perspective” and their voices “need to be heard.”

As Villarruel says, there is a gap between the value and leadership we know nurses can provide, and the perceptions of other health care decisions makers. “It’s time to close that gap.”

Why is now the right time for nurses to participate in board leadership?

- Realizing the promise of health reform requires nurses’ skills and perspectives
- Nurses are underrepresented on boards – only six percent board members of 1,000 hospitals compared to 20 percent for physicians.
- Health care opinion leaders agree that nurses should play a greater leadership role
- And the IOM report calls for nurses to play a greater role in leadership at all levels
- Nurses are involved with almost every aspect of patient care delivery. They provide an essential point of view on a number of critical issues currently facing our health care system.
- Nurses have enormous **credibility** with patients and their families, but also with policymakers, employers and health plans. And they enjoy high **public trust**, as the top-ranked profession for the last eight years in a Gallup poll of honesty and ethics.

In the video clips, nurses said, “we already have many of the qualities needed to serve on a board,” such as:

- Nurses have firsthand insight into the views and concerns of patients and families.
- Nurses have expert knowledge of how best to achieve high quality care and increase patient safety.
- Nurses help solve long-standing problems, including combating fraud, and creating innovative solutions to improve patient care.
- Nurses also understand the need for interprofessional collaboration among all health care professionals —including nurses, physicians, pharmacists, therapists and frontline workers – both in hospital and community settings.

Board service can also be personally and professionally rewarding, it expands skills, advances knowledge, and provides an opportunity to meet people beyond our own network.

“It can feel empowering, and inspirational too!” said Villarruel.

What are the responsibilities of serving on a board?

Stewardship:

Stewardship is placing the interests of the organization above yourself or the advancement of any special interest group or personal agenda. It's about taking a multidimensional position – understanding the big picture and broad perspective.

“It's about a belief in, and allegiance to, something greater than yourself,” says Villarruel.

Part of being a steward involves **accountability**. A board member has the responsibility and authority to act in the best interest of the organization. Being accountable also means it is a board's responsibility to ensure they adhere to the law and to ethical standards and accept responsibility for its actions.

Another important part of stewardship is **responsibility**. The board has a responsibility for managing and making decisions at a level that will guide and direct the organization as it carries out its mission.

Governance:

Stewardship focuses on the greater good, while **governance** is the process by which the greater good is served and realized.

Governance is the process and structure of providing strategic leadership to an organization. It involves decision-making in key areas as well as the process by which decisions are implemented.

Effective governance is critical to the success of any organization and is the critical responsibility of board members. The standards of governance include core values, vision, and supporting the organization's mission.

A board and its members lead and encourage others to act in the best interest of the organization. Decisions are board actions not individual actions.

The specific functions that make up the process of board governance are operational performance, strategic planning and direction, policymaking, advocacy, stakeholder relationships, fiduciary oversight, fund development and leadership development.

“It is very important to emphasize that a nurse must never go onto a board with the expectation of advocating solely for other nurses. You are not the “nurse representative” on a board – your role is to advocate on behalf of those in the organization,” says Villarruel.

What are the skills needed to be a board member?

- Be passionate
- Create a Personal Strategic Plan
- Start Locally
- Build Connections
- Seek Ongoing Education.

Think about the issues about which you are most **passionate**—perhaps children, elderly care, gender inequalities—and on which you have some knowledge or skill. Find an organization—perhaps first a local organization—that has a mission, value and/or vision that you feel passionately about.

- *Dedication to a cause.* For example, Catherine Dodd sits on the Breast Cancer Fund board because she cares deeply about the issue.
- *Willingness to commit.* Before you join, make sure you understand the time and commitment it takes to serve on a board. Board service isn't just about showing up to meetings, it's about actively participating - by being prepared and providing solid input to the discussion.
- *Goal for the overall good of an organization.* Choose a board that has an overall mission that you can support.
- *Demonstrate Expertise.* Passion must be accompanied by expertise - board members must bring something to the table.

Create your own **personal strategic plan** for achieving your goal of board participation.

A personal strategic plan has several elements. You need to spell out your objectives – or what you want to achieve. Then, you need to come up with specific tactics or action steps. What are the specific things you need to do? What do you need to learn? How are you going to learn them? Whom do you need to talk to? What is your time line for each step along the way?

The act of creating your own strategic plan will give you direction, will make it obvious what you know and what you need to learn – and should include milestones and markers to let you know if you're on the right path.

Leadership and board skills don't develop overnight – they take time to grow. And the best way to do this is to start **local** and look for opportunities for service. Think first about local non-profit or community organization – join and volunteer to serve on a committee or project. You can also volunteer to serve on committees at work, in state and national nursing organizations, or in local government. Committee work is the first rung in the leadership ladder. Assume responsibility within these organizations and do a good job.

Nurses must begin to build **connections** not only in nursing but within our communities. Take visible leadership roles in areas of substance and impact. Advocate for action at the local, state and/or federal level. Get out there and develop the connections you need to make your name known.

Other important ways to build connections include:

- *Find a Mentor*– Find a leader who has already achieved some of the goals you aspire to. Maybe another nurse, but also consider other professions – someone who is willing to advise you, give concrete advice, who can enhance your professional development and will encourage you to reach your end goal.
- *Volunteer*-- Individuals who truly embrace an issue or an organization—and are willing to invest sweat in helping that issue or organization—will volunteer to get a firsthand perspective of the people, the language and the values needed to support the cause.
- *Network*-- Develop a network of allies - both male and female– who serve as executives or board members of companies and organizations, especially ones *outside* nursing and health care.

Nurses should continue to **educate** themselves on leadership and board skills.

Sigma Theta Tau offers an excellent on-line education program that serves as an introduction to board service, and we relied on much of its content to shape this presentation. Graduate business schools offer board training programs, as well as organizations such as the Center for Creative Leadership that offer training and certification.

There are books on governance, *Trustee Magazine* for hospital board members, and a number of websites with excellent information. Serving on a board requires specific expertise in board governance as well as general leadership skills – and these resources are a good way to acquire greater board knowledge.

Next Steps:

CCNA will continue to provide Technical Assistance on the topic of leadership through a series of upcoming webinars.

There will be a two part series in May and June in which nurse leaders from a variety of health plans will present the various roles that nurses fill in national health plans and how they can lead change to advance health among consumers.

In September CCNA will feature four nurse graduates from the Sigma Theta Tau Leadership Academies who will share their journey on becoming nurse leaders.

The IOM's recommendations include: the need for more advanced education of registered nurses; nurses leading innovations in health care and being appointed to decision making bodies; all nurses practicing to the full extent of their education and training; a more diverse nursing workforce and faculty; and more interprofessional collaboration among nurses, physicians, and other members of the health care team in the educational and clinical environments.

This webinar and a resource page are archived at <http://championnursing.org/webinars> For a DVD request form, visit <http://championnursing.org/nurse-leaders-resource>

For more information from the Center to Champion Nursing in America about this webinar, technical assistance or other questions related to the Future of Nursing, Campaign for Action contact Michael Pheulpin at MPheulpin@aarp.org or 202-434-3882.

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