

Board chair coaching process

Some boards have realized that board chairs can no longer afford to grow into their role because of the continually shifting health care environment. Therefore, progressive boards are beginning to make coaching available to all incoming board chairs to build the board's capacity to lead effectively in a topsy-turvy world.

A good coach focuses on what the board chair wants to accomplish and designs a coaching process based on how the board chair experiences the role; on assessment of individual strengths and weaknesses; and on identifying and addressing blind spots. Each coaching process should be customized to meet the board chair's individual needs and goals.

To learn more about the board chair coaching process, [click here](#).

Potential areas that could be addressed through a board chair coaching process include:

- The board chair/CEO relationship and what the chair and CEO want to accomplish together
- Understanding the organization's stakeholders
- Communicating with clarity and purpose
- Future board composition and diversity, including leadership succession
- Creative ways to foster board engagement (e.g., planning for and leading great meetings)
- Change management
- Managing conflict; managing through resistance; responding to breakdowns and learning from them
- Working within complexity and polarities (e.g., competing priorities; system versus local entities)
- How to be a whole person while serving in the chair role (e.g., finding work/life balance; handling stress; knowing what to do and what to stop doing)
- Assuming a greater public-facing role internally and externally (e.g., accompanying the CEO when having "difficult conversations" with key stakeholders; representing the hospital in the community through facilitating community forums/dialogue or becoming a member of a community partnership board)

A good board chair coaching process should include the following steps:

- **Execute a coaching contract upfront** that defines desired outcomes, establishes a time-frame for the process and includes measures of success ([Click here](#) for a sample agreement between a board chair, CEO and chief of staff).
- **Hold an initial meeting among the board chair, CEO and coach** to discuss the coaching process and timeframe (typically six to 12 months), relative roles in the process, the importance of confidentiality and what it means in the coaching context, and when to set future check-in meetings to stay on course. It may be beneficial to include the senior human resources executive in this discussion to ensure the executive is aware of the coaching process and can act as a liaison, as needed, with the full board.
- **Conduct an initial assessment and design the coaching process.** This step involves conducting interviews and observing meetings to learn about the board's culture, gather feedback about how the board chair is perceived by stakeholders, and better understand how the board chair does the job. The coach then debriefs feedback results to help the chair determine what implications the results may have for leadership of the board. This step also may include having the board chair complete an emotional intelligence inventory, a leadership inventory and a personality inventory.
- **Devise a personal development plan that could focus on a variety of issues**, including board meeting agenda planning and preparation, getting into a "ready position" to lead an effective meeting, better ways to conduct and facilitate a meeting, or developing better relationships with key stakeholders. It might include activities such as: education and training on leadership skills as well as current and emerging issues facing the organization; or leadership of a specific board committee or task force that exposes an incoming chair to a broader range of stakeholders and their needs.
- **Conduct coaching conversations**, typically held one to two times each month and structured by the board chair to focus on key needs. The board chair may report on skills practiced, or may discuss relationship roadblocks or seek feedback on issues or situations where the chair feels uncertain or "stuck." The goal of these conversations is to ensure the board chair gains insight and identifies next steps needed to move forward. The coach records these results and uses them to begin the next conversation.
- **Set a concluding meeting with the board chair, CEO and coach** to review coaching outcomes and discuss next steps. Some chairs engage their coach to continue to provide guidance and support throughout their term as chair.

Excerpted from "[Coaching: A Critical Tool for Board Chair Development](#)," by Pamela R. Knecht, Kimberly McNally and Mary Totten (*Trustee Insights*, January 2019).

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