



Take on Board Podcast – Episode 354

# Transcript – Helga Goes Solo: Tailoring board inductions to the organisation and more ideas

Welcome to the Take on Board podcast. Being on a board can be an incredibly valuable, interesting, and exciting experience, yet it can also be lonely, challenging, and let's face it pretty hard. So here at Take on Board, I'll bring you weekly tips, tricks and advice to help you navigate your way onto a board, onto your next board, and to build your governance wisdom now on with the show.

Hi folks. This week is one of our short and sweet solo episodes by me, and I'm going to be talking to you about inductions, board inductions. I'm talking about it because I seem to have been having a lots of conversations with board directors, with chairs, with my own board. because we've got some new board directors just about.

Some ideas, I guess for a good induction. Like anything, the best induction is one that is tailored for your organisation. But what I want to do is just take you through some different ideas that I've been talking to people about and that I've been hearing, and you can borrow some of those ideas if they work for you.

So things that are worth keeping in mind. Um, I love a good framework and the framework that I think about for inductions is around context compliance. Culture and making sure you cover off on all of those things as you are. Devising and designing your induction program. So first up, the technical toolkit you might put in place.

Things like a buddy system, one of the boards that I am on, as I said, we've got some new board members. We allocate people, a board buddy. And an ELT buddy, a buddy from the executive leadership team. Both of the board buddy and the ELT buddy are people preferably that they're not on committees with, uh, or that they won't be dealing with too regularly.

Likewise, the ELT person, and just one note with the ELT person, we have made it clear that it's for the. Board member to reach out to the ELT person, not the other way around. And the conversations there shouldn't be operational. It is around strategic governance, things that they might need to know, but all of it is relationship building.

The culture side. Uh, the other thing that is key is the pre. Board briefing. That might be a meeting with the CEO. It might be meetings with other executive leadership members. It might be a meeting with the chair or the chair of committees, the chairs of committees. Uh, it might be just walking through some of the hot button issues that are on the radar that board members would need to know before their first board meeting.

The third thing in that technical toolkit, the tips and frameworks. The at a glance dashboard, uh, and I confess, I wish I'd read this. Prior to doing the induction for our new board members, we provided the strategy, we provided the risk report, we provided the financial health snapshot, all of those things, sorry, not the financial health snapshot, the financials.

And in thinking about this more, and in conversations with people, one thing that's been suggested is that they are. I know chunked up plan on a page if possible, and the current strategic priorities, the top three risks and what's going on there. And a financial health snapshot. So not all of the documentation or all of the documentation plus as you would do in a board paper, a cover sheet so that it just gives people, uh, information to go through because I don't know about you.

Inductions can be just this massive information dump. In the olden days, my first board, the YWCA, it was a folder or possibly two folders. It was possibly two of those massive lever arch files. These days, everything's online, so there is endless folders, you know, online folders for people to read through.

And I think it's really, we've got to get beyond that. We've got to get into something that is a value for people, not just an information drop. So what's the information that people need prior to their first board meeting and setting that up in the technical toolkit. The second thing, and this is, you know, I'm a facilitator, so I'm having loads of these conversations, but conversations with people and thinking about it for my own board are about workshops.

Workshops, build relationships. They really build the culture side of things. And when new board members join, it's essentially a new board, particularly if it's more than one board member. So sometimes you need to reset the culture or at least re-familiarize the culture and just see what those new board members are bringing so that.

Everybody's on the same page. So some of the ideas for workshops that might be an hour or two, might be a half day, might be a full day, might even be a full retreat. Uh, or, or immersive. Some of the ideas, things like a legacy and future map, so getting some of the board members that have been on the board for quite some time, sharing key achievements during their time, and then getting new board members to share their fresh perspectives.

Second idea, who are we and what do we bring? So this could just be the skills matrix and often new board members join, they fill in the skills matrix and it's a paper in the board pack or in the, you know, here's the foundation documents for this organisation. I would say bringing that to life with a conversation is, oh, just so much more effective.

So you might pair people up in a room and in their paired conversations, get them to share what are the two or three skills that they bring to the boardroom, and then get them to introduce each other to the wider group. Uh, again, it just brings it to light so much more, and. Even if it is just the skills matrix, making sure that is shared with everybody.

I noted that, uh, recently, again for one of the boards that I'm on, uh, we recruited somebody who had these fantastic financial skills, and it was only when I looked at the skills matrix that they had updated that tech transformation was on their list as well. I had no idea about that. Now, I'd seen the application, I'd interviewed this person, you know, I was in the process.

Tech transformation was new to me, so sharing that even with some of the people that have been involved can be very helpful. Uh, conversations about the rules of engagement. Oh, this can look different for different organisations, but some of the prompting questions that I've used in workshops with groups are things like, what do we need to do and how do we need to be to ensure the board functions as best we can?

And then how do we all contribute collectively to make that happen? And then how do I contribute as an individual to make that happen? Then you look at the common themes, bring them together, but also ensure that individuals make a commitment for their own individual contribution to that. There might be some other prompting questions you can use around these sorts of things like, what are we here to do?

How do we commit to working together? What do we value in each other? What behaviours do we encourage? What do we need to guard against? What are the board's expectations of the CEO and what are the CEO's expectations of the board? So they can be some really useful conversations to have. Uh, there might be a workshop or a part of a workshop around debating and how do you debate?

How do you do that robustly? So don't assume that everybody knows how to do this. So you might have conversations about how do we handle dissent? Or what does a good question look like? You might have a conversation about operational versus governance. Again, we all kind of, these things often roll off.

Yeah. Management does the operations, the board does the governance, but what does that really mean in this organisation? And having a clear understanding of that from the board perspective can be very valuable and can be really valuable for new board members. So they know what they are dealing with.

What's the board's role in strategy? Uh, so yeah, what is the board's value add in strategy? What is the organisation's role in strategy? And some questions that, uh, we did in a workshop with an organisation that I did in a workshop with an organisation, and I loved this. It was prompted by, you know, it was tailored to this organisation, but what is the board?

Need from the CEO to make the strategy zing. And what does the CEO need from the board to make the strategy zing? I loved that. What is the work of a board member might be a question you explore and sometimes this is about making visible. The invisible. There is a lot of board work that sometimes we do just in the phone calls we make between ourselves or attending events or reporting in on things.

It's not just obviously attending board meetings, it's not just attending committee meetings. So sometimes having that conversation at the outset with new board members and hearing what they have done in other boards about, you know, sometimes that invisible work again, can be really helpful for getting on the same page.

Uh, using the organisation's values to identify boardroom behaviours can be really helpful, basing it around that. And the other thing that I think is really helpful, which can be built into a workshop or an immersive or something, is going on tour, depending on what your organisation does, uh. A previous board that I was on, the YWCA, we ran a lot of housing, so we would do a bus tour and attend the housing.

Uh, obviously interacting with clients only when it was completely, you know, done in a safe way and with consent and all of those sorts of things. Uh, but being a, even just being out. Being able to see the housing that we ran was incredibly valuable. Um, hospitals often do this. You do a walk around, again, only interacting with patients in a safe way or even with staff in a safe way.

But I know as a hospital board director, doing those walkarounds was incredibly valuable. And hearing from staff and hearing from patients and seeing things live really useful. So doing that as a live thing with new, uh, board members can be really useful. So there's some ideas for workshops. The other part of an induction.

Indeed. The other part of any evaluation in a way is doing the circle back. So 30 days in, 90 days in circle back with your new board directors and just check in with them. That might be done by the board buddy. It might be done by the chair, whoever it's done by. Just make sure it's done. So checking in with them, seeing how things are going.

Asking if it's meeting expectations and if not, why not? And what could be done, um, what's still missing for them. So yeah, just making sure those new board members feel as supported and. Welcomed and able to have those robust discussions as possible. So the circle back is key. So remember again those three things.

Context, compliance and culture, and just seeing what you can build into your board induction process that picks up on those things. Now, folks added bonus. I'm working on a checklist for inductions. Again, please know that a checklist. Is just a tool that you can use and you can pick and choose from that checklist.

It should be tailored to your organisation, but I'm working on it. It might be available by the time this podcast goes to air or maybe a little bit afterwards, but the things that I will be prompting on that checklist, first up, the knowledge pack. It can be digital or physical. The board charter, the strategic plan, the financial health, the risk register, the board minutes, and the org chart.

There may be other things in yours, but those sorts of things should be in that, you know, download, shall we say. The who's who relationship building. So meeting with the chair one-on-one. Uh, the CEO briefing, as I talked about before, and that might be other board members, and it might be other ELT members as well, the board buddy, the ELT buddy, maybe a stakeholder tour, who are our key stakeholders.

Again, one of our organisations that I'm on the board of. We have a stakeholder engagement plan. It lists all of the key stakeholders who holds those relationships. That's a really useful thing for people to either get as a document or to be walked through and just the contact details of all of the other board members so they know how to get in touch.

Then there's the housekeeping. So logistics, access to the board portal, the calendar of meetings, the insurance policy if relevant, conflict of interest policy, and, you know, declarations for all of the other board directors and your the new peoples. Um, declarations, expenses, policy might be, uh, worth a look at.

Um. Even things like, although this might come in the who's who in the relationship building professional development, what are the expectations for board members? How is that done? How is it, um, funded? Is there a policy around that as well? And finally, in this checklist, there'll be some, you know, culture immersion.

What are the written rules? They'll be in the board charter or in other policies, or in the values, but there might be some unwritten rules as well. Though sometimes if you're going to write down the unwritten rules to share them, just make them written rules. There might be a first 90 days roadmap, either for the induction of that board member or even for those individual board members and what they are expecting to contribute in that first 90 days.

And I've talked about this earlier in the workshop, but the skills audit and updating there. So as I say, there'll be a bit of a download coming soon. Possibly in the show notes to this episode, possibly coming soon. So folks, inductions, I would love to hear what you do for your inductions at your boards.

Uh, as I say, today's episode is partly from conversations I've been having with board directors and partly my own experience, uh, partly workshops I've been working with. So I would love to hear what you are doing as well, because sharing that information is key. So you might like to do that over in the Facebook group.

Or on the LinkedIn post about this episode or just get in touch. If your board needs any support with your board induction, please feel free to get in touch, particularly if there's going to be a board workshop. I love running board induction workshops with boards, so if that's something that might be of value for your board, please feel free to get in touch and let me know what you think about the download checklist once it's available.

Alright folks, that is it for today's episode. Again, please get in touch and let me know how inductions are going for you and if you've used any of these ideas or whether you've got additional ideas to share with the Take on Board community. That's it from me. Thanks folks. See you next week. So that's a wrap for the Take on Board podcast today.

Thank you so much for being here and being part of the Take on Board community. I do this podcast because I love bringing good women and gender diverse people together. So I invite you to join us over in the Take on Board Facebook group, an active group that helps supports and cheer squads each other.

Just search, Take on Board in Facebook to find us. I would also really love it if you could do some of the other well podcast things, share the podcast with someone you know who might get some value from our discussions. Subscribe if you haven't already, and well, I also really love it when people rate and review.

Thanks again for being part of the Take on Board community. Now go and put these tips, tricks, and advice into action so you can be your best in the boardroom.

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