

The background of the slide is a dark blue field filled with a repeating pattern of white line-art icons. These icons represent various concepts related to healthcare, finance, and business, including medical equipment like stethoscopes and syringes, financial symbols like dollar signs and pie charts, and human figures. The icons are arranged in a dense, overlapping grid.

Mentoring your new board members

Why it's important and tips on how



CONCORDIA PLANS

Mentoring your new board members – why it's important and tips on how

In 2020, during the height of COVID, four new members were appointed to the CPS Board. As they onboarded, it became evident we needed to look at the programs we had in place and determine how to improve board member experience in a world of Zoom board meetings, in which it was challenging to build relationships and trust.

I developed the Board Mentorship program as a way to assist board members in their growth and development with a heavy focus on fully integrating the new board member to further their effectiveness and experience. The program is intended to:

- Deliver a learning experience that could not be easily obtained within the board room;
- Assimilate new board members in the culture of the board and CPS as an organization;
- Serve as a complement to board governance training and board orientation; and
- Provide guidance, support and a connection for new board members by pairing an incoming board member with an experienced member who was willing to serve as a mentor.

Facing a steep learning curve and a board that already has a history together, it isn't unusual for new board members to sit back, observe, and cautiously venture into discussions as they try to figure out where they might make a contribution.

When developing the mentorship program, it was done through the lens of:

- Fostering a level of board engagement, creating a more immediate connection to the organization and enhancing the new member's ability to contribute to the board sooner;
- Allowing a new board member to see the big picture and surrounding context, making him/her better able to make informed decisions;
- Building social capital within the board structure;
- Creating a more cohesive board;
- Increasing meeting productivity because time is not spent acclimating new members; and
- Offering a new board member someone s/he can call on with questions who has previously been a new board member.

In advance and at the conclusion of each quarterly board meeting, I asked the mentor to connect with their mentee to discuss any questions. On months in-between, I reminded the mentor to make a connection with his or her mentee and provided content to consider for their touchpoints. The roadmap that follows served as my guide.

Through this process I learned it was critical to have the mentor attend the new board member orientation session so there was alignment around future conversations between the pair. It was even more critical to allow the board members to connect and build a relationship organically.

Good luck as you work to integrate new members onto your ministry's board, and I hope the resources that follow are useful to you and your ministry.



Initial feedback from a new board member:

- "The ability to ask questions and not made to feel incompetent is very positive."
- "Just knowing a mentor is available has been comforting."



Initial feedback from a board member:

- "I think the new board member mentor program has been tremendously helpful to have a plan ready to help those who may struggle with 'why am I here and what are we doing?'"

Sherri Morris

Sherri is the Administrative Director for the CPS President's Office. One of the many things Sherri is accountable for is shaping board member experience, making sure CPS makes their service efficient and effective, as well as enjoyable and satisfying. Sherri has been an employee of the Synod for more than 25 years – serving LCEF, LCMS World Mission, and Ministry to the Armed Forces prior to joining CPS in 2008. She has a passion for coaching, mentoring, and serving others.



Roadmap for mentoring relationship

Month 1 (prior to first board meeting)	<ul style="list-style-type: none"> • Share previous board experiences • Share expectations of each other • Mentor <ul style="list-style-type: none"> > reviews basic information about the ministry and answer questions > provides an overview of the board culture, how to prepare for the board meeting and what to expect at the meetings 	SUGGESTED READING / RESOURCES <ul style="list-style-type: none"> • The ministry's website • Material from new board member orientation packet
Following board meeting, answer any questions.		
Month 2	<ul style="list-style-type: none"> • Mentor <ul style="list-style-type: none"> > clarifies roles of board and management > provides an overview of the board roles and its committees 	SUGGESTED READING / RESOURCES <ul style="list-style-type: none"> • Material from new board member orientation packet
Month 3	<ul style="list-style-type: none"> • Review the ministry's org chart • Discuss <ul style="list-style-type: none"> > board's responsibility to oversee organization > board membership • Mentor <ul style="list-style-type: none"> > answers questions interpreting financial statements > outlines lines of communication and information flow between board members, committees, President & CEO, management 	SUGGESTED READING / RESOURCES <ul style="list-style-type: none"> • Material from new board member orientation packet
Month 4	<ul style="list-style-type: none"> > Discuss committee responsibilities > Outline flow of committee / board meetings > Discuss meeting agendas > Make introduction to committee chairs 	SUGGESTED READING / RESOURCES <ul style="list-style-type: none"> • Charters • Relevant committee / board agendas • Minutes from previous meetings
Following 2nd board meeting, answer any questions.		
Month 5	<ul style="list-style-type: none"> • Discuss the ministry's vision, mission and values • Discuss organizational metrics and strategic priorities • Assess mentoring relationship: what's working, what could be improved 	SUGGESTED READING / RESOURCES <ul style="list-style-type: none"> • Material from new board member orientation packet • Metrics and strategic priorities
Month 6	<ul style="list-style-type: none"> • Discuss peer and self-review and board effectiveness evaluation process • Discuss any further training mentee needs 	SUGGESTED READING / RESOURCES <ul style="list-style-type: none"> • Previous board evaluations

Board mentorship program

For board mentor

Program objectives:

- Provides guidance, support and a board connection for all new board members by pairing an incoming board member with an experienced member who is willing to serve as a mentor.
- Focuses on fully integrating the new board member in order to further their effectiveness and experience.
- Helps assimilate new board members in the culture of the board—and the organization.
- Serves as a complement to board governance training and board orientation.
- Assists new board members in their growth and development on the board.
- Is an efficient way of sharing knowledge and developing cross-functional understanding.
- Is intended to deliver a learning experience that could not be easily obtained in the board room.

Criteria for board mentor:

- A trusted and experienced advisor who has direct interest in the development and education of a new board member.
- Minimum of one year on the board.
- Good knowledge of roles of a governing board.
- Good knowledge and understanding of the ministry's strategic priorities.
- Willingness to share knowledge.
- Comfortable with the time commitment of mentoring a new board member.
- Understanding of challenges faced by new board members.

Role of mentors:

- Meet (virtual / via phone / in-person) with the new board member before the first meeting
 - > Get to know the new board member, help him/her understand what to expect at the first board meeting, etc.
- Serve as a coach during / after the first board meeting
 - > Be accessible for questions in-between presentation blocks, after the meeting
 - > Translate terms and acronyms, help him/her navigate through the board portal, etc.
- If s/he misses a meeting, send the message that attendance is important and that his/her participation was missed. Walk through some of the key decision items.
- Debrief after meetings / follow-up between meetings to provide additional information, history or perspective an experienced board member can bring.
- Be accessible to your mentee (in-person, phone and email).
- Support and encourage your mentee's development.
- Serve as a resource person if your mentee has questions (even if it's just to point them to the right ministry contact).
- Offer input and guidance.

Time commitment:

- The mentoring relationship will last at least one year (four meetings).
- Frequency of meetings will depend on the goals of both the mentor and mentee.

Measuring program success:

- Confident, prepared, informed and engaged board members.
- Reflected in peer and self-reviews and board effectiveness evaluations.

Evaluate:

- To allow for continuous improvement and means of identifying ways to increase effectiveness of the board mentorship program, document what worked well and what did not through an evaluation provided to the board chair or ministry on-staff leader.

Board mentorship program

For board mentee

Program objectives:

- Provides guidance, support and a board connection for all new board members by assigning an incoming board member with an experienced member who is willing to serve as a mentor.
- Focuses on fully integrating the new board member in order to further their effectiveness and experience.
- Helps assimilate new board members in the culture of the board—and the organization.
- Serves as a complement to board governance training and board orientation.
- Assists new board members in their growth and development on the board.
- Is an efficient way of sharing knowledge and developing cross-functional understanding.
- Is intended to deliver a learning experience that could not be easily obtained in the board room.

Criteria for board mentee:

- Recently appointed to the board.
- Board member who is not new but is having challenges getting acclimated in their role / committee assignment(s).
- Commitment to increasing their capacity as a board member.
- Willingness to commit the time to increase their effectiveness on the board.

Role of mentee:

- Meet (virtual / via phone / in-person) with your mentor before the first meeting for a “get to know each other” conversation and so your mentor can help you understand what to expect at the first board meeting, etc.
- Be prepared to debrief with your mentor after meetings / follow-up between meetings so s/he can provide additional information, history or perspective an experienced board member can bring.
- Ask your mentor questions particularly if you are not comfortable asking them with the entire board and ministry staff present.

Time commitment:

- The mentoring relationship will last at least one year (four meetings).
- Frequency of meetings will depend on the goals of both the mentor and mentee.

Measuring program success:

- Confident, prepared, informed and engaged board members.
- Reflected in peer and self-reviews and board effectiveness evaluations.

Evaluate:

- To allow for continuous improvement and means of identifying ways to increase effectiveness of the board mentorship program, document what worked well and what did not through an evaluation provided to the board chair or ministry on-staff leader.



QUESTIONS?

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