

Key Online Resources for Training Health Center Board Members

Health center governing boards are required by the Health Resources & Services Administration (HRSA) to ensure that health centers provide high quality, patient-centered care to the communities they serve. Community and special population representative board members play a key role in this effort, bringing the voice of their communities to each board meeting. However, board members come from many backgrounds and require effective governance training in order to succeed in their roles!

Health centers can meet this challenge by considering the unique needs of community and special population board members, such as preferred language, training frequency, and convenience.



Strategies include:

1. Provide board training materials in plain language to the extent possible, especially with complex financial topics. The materials must also be linguistically appropriate. For example, migratory and seasonal agricultural worker (MSAW) representatives often require Spanish or other non-English learning materials. (Note: Language access is a requirement for health centers under federal law and best practice is to have an interpreter available for in-person trainings.)
2. Commit to assessing board competencies and planning for ongoing development, understanding that all health center board members need time and practice to master the complex tasks of governance and to become active participants in board meetings.
3. Supplement in-person, all-board training with short, focused individual and group training sessions, including online learning to accommodate the many time and travel constraints placed on health center board members.

The purpose of this resource is to help health centers incorporate online learning into their board governance training plans, including eLearning modules and short videos developed by the National Association of Community Health Centers (NACHC) and the National Center for Farmworker Health (NCFH). NCFH has translated several of the NACHC modules and added English and Spanish Discussion Guides to support group learning activities. This resource also offers several strategies for developing board training plans.



The Importance of Multiple Learning Methods

Board members learn in many ways, and not just during formal in-person training. The resources below provide specific topics that are accessible online, and several have been translated into plain Spanish.

Why is this important to special population board members? Consider the following example:

Representatives of the MSAW population come from many cultures and are frequently on the move or located in remote areas. They often require learning materials in Spanish or other non-English languages. For example, a newly appointed MSAW board member, traveling during their first month on the board, could review a short video in Spanish about the roles and responsibilities of the board, maintaining their learning schedule despite traveling for work. With a short, focused module, the board member could accomplish some of their learning on their own, without feeling overwhelmed.



eLearning and Short Video Learning Resources for Health Center Boards

Health centers can take advantage of an expanding list of no-cost resources available online, to provide support to board members in their learning journeys:

Migrant Health Resources

Presented by the Ag Worker Access Campaign Task Force

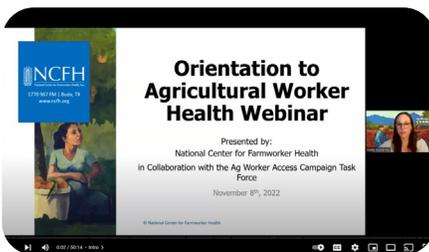


[60 Years of Migrant Health – Migrant Health Program History and the Agricultural Worker Experience](#) (English only)

Released in 2022, this video from NCFH brings to life the rich history of the Migrant Health Movement since the signing of the Migrant Health Act in 1962. The video is a critical resource to inspire and focus the board on the health center's agricultural worker patient population.

[Keep Hope Alive](#) (English only)

This brief video, produced by NCFH, covers 30 years of migrant farm labor in the United States and the start of the Migrant Health Program.



[Orientation to Agricultural Worker Health](#)

This recorded training program (also available in [Spanish](#)) is intended to provide new health center staff and board members with an orientation to the MSAW population and the Migrant Health Program. Topics include demographics, working and living conditions, occupational health and safety, unique health care issues, barriers to accessing health care, migrant health policy, and service delivery models.

General Governance Health Center Resources

[The Board's Role in Strategic Planning/La función de la junta directiva en la planificación estratégica](#)

This short video from NACHC describes the strategic planning process and the role of the board in strategic planning. The Spanish version (also available from the above link at the Health Center Resource Clearinghouse) was translated by NCFH.

- NCFH has also prepared Discussion Guides in [English](#) and [Spanish](#) as companion resources for the *The Board's Role in Strategic Planning/La función de la junta directiva en la planificación estratégica*. The Discussion Guides provide instructions and review questions so that boards can present the videos to members in groups, then assist members in reflecting on what they have learned.

[Health Center Board Roles/Funciones de las juntas de los centros de salud](#)

Health Center Board Roles is a short video developed by NACHC providing an overview of the roles and responsibilities of health center board members. The Spanish version (also available from the above link at the Health Center Resource Clearinghouse) was translated by NCFH.

- NCFH has also prepared Discussion Guides in [English](#) and [Spanish](#) as companion resources for the *Health Center Board Roles/Funciones de las juntas de los centros de salud*. The guides provide instructions and review questions so that boards can present the videos to members in groups, then assist members in reflecting on what they have learned.

[Modules on Board Financial Oversight](#) and [Modulos en capitación financiera para la junta directiva](#)

Developed by NACHC and experts from the financial accounting field, with Spanish versions translated by NCFH, this five-part eLearning series provides concise, easy-to-understand training on the board's role in oversight of the health center's financial activities. The modules (all available from the above links at the Health Center Resource Clearinghouse) are listed below. NCFH also prepared the Discussion Guides in English and Spanish for each module in this learning series.

Module 1: The Board's Role in Financial Oversight/Capitacion financiera para la junta directiva

Topics include approving and monitoring budgets, reviewing financial statements, ensuring financial controls, approving sound policy, reviewing the audit and the IRS Form 990.

- Discussion Guides in [English](#) and [Spanish](#)

Module 2: Reading and Understanding the Balance Sheet (Statement of Financial Position)/Lectura y comprensión del balance general financiero

Topics include key financial information contained in the balance sheet and important related concepts, including an example of interpreting the balance sheet.

- Discussion Guides in [English](#) and [Spanish](#)

Module 3: Reading and Understanding the Income Statement (Statement of Activities)/Lectura y comprensión del estado de resultados

Topics include key financial information, concepts and terminology contained in the income statement and how to interpret its meaning.

- Discussion Guides in [English](#) and [Spanish](#)

Module 4: Understanding the Importance of Cash Flow/*Comprensión de la importancia del flujo de efectivo*

Topics include an overview of the statement of cash flow, with information about its components and how to interpret cash flow information.

- Discussion Guides in [English](#) and [Spanish](#)

Module 5: Key Financial Performance Indicators/*Indicadores clave de rendimiento financiero*

Topics include how key financial performance indicators (KPIs) are determined and what they mean in assessing health center financial performance.

- Discussion Guides in [English](#) and [Spanish](#)

[Health Center Program 101 eLearning Module](#) (English only)

NACHC has produced this five-part eLearning program as a comprehensive overview of the HRSA Health Center Program. It is designed for all health center staff, with chapters for board members.

[Sliding Fee Discount Program: The Fundamentals for Health Center Boards](#) (English only)

This short video from NACHC describes the basics of the Sliding Fee Discount Program required by the HRSA Health Center Program. Spanish translation is planned for 2024.

[Tips for Health Center Boards for Evaluating the Sliding Fee Discount Program](#) (English only)

This short video provides guidance for board members working with the CEO to evaluate and update their health center's Sliding Fee Discount Program. For newer board members this resource is intended as a follow-up to the "Sliding Fee Discount Program: The Fundamentals for Health Center Boards." Spanish translation is planned for 2024.



Tips for Using Online Modules

Be mindful of a few tips when offering online learning to health center board members:

- Ensure board members can access the modules with appropriate devices, such as a tablet or computer, and a stable internet connection.
- Assign a staff member to respond to needs for technical assistance accessing online resources.
- Consider blending the online modules with in-person training and taking advantage of the Discussion Guides for training board members in groups.
 - For example: "Health Center Board Roles/*Funciones de las juntas de los centros de salud*," (listed above), is well-suited to training board members in groups. The companion Discussion Guide (also listed above) for this short video helps board members ask questions and remember the information they have learned.



- Ensure that the topic assigned or selected is relevant to board members' current needs:
 - “The Board’s Role in Strategic Planning/*La función de la junta directiva en la planificación estratégica*,” (listed above), provides an opportunity for group training prior to helping plan and approve the health center’s strategic objectives.
 - The 5-part eLearning series, “The Board’s Role in Financial Oversight/*Modulos en capacitación financiera para la junta directiva*,” (listed above), can be offered to those individuals or groups who need training on the concepts required for reviewing and understanding health center financial reports.
- Evaluate the effectiveness of the online modules by asking for feedback from board members. Were they able to apply the concepts learned to their participation in board meetings? Did the modules help them feel more confident in understanding their roles and responsibilities?



Tips for Using the Discussion Guides

As you begin, be mindful of time and be sure to know everyone’s name and title. Facilitators should remind board members that there is always more to learn about health center governance and encourage participants to ask questions at any point. More tips are available in each guide, including the following:

- If conducting a virtual training, consider using polls or the chat feature to gather feedback and engage your audience.
- If questions have been submitted ahead of time, use them as conversation starters or include them in the appropriate topic areas. As you go through the discussion guide, confirm that the questions and follow-up questions have been addressed before going to the next question.
- Invite members to share a one-two minute reaction to the e-learning module.
 - For example, “What do you think about your role in understanding the importance of cash flow?”
 - And “What about this role do you find challenging and may need additional support with?”





Additional Best Practices on Board Training

Several other strategies help define an effective board training plan. To assist with each, we have included a few online tools and publications from the [NCFH Health Center Toolbox](#), [NACHC website](#), and the [Health Center Resource Clearinghouse](#).

1. Provide members with a strong start to board service to encourage early and active engagement in board meetings.

- Offer board leadership training, such as the following curriculum from NCFH.
 - [Becoming a Leader in Migrant Health Training Toolkit](#)
- Give newly appointed members this key reference to refer to as an ongoing guide.
 - [Governance Guide for Health Center Boards \(English/Spanish\)](#)
- Develop and deliver a well-structured board member orientation training and health center handbook to newly appointed board members. The template and facilitator guide below are designed specifically for health center board orientation.
 - [New Board Member Orientation: PowerPoint Template & Facilitator Guide](#)
- Identify board member training gaps. The checklist below includes suggested topics to track.
 - [Board of Directors Orientation Checklist](#)
- Pair seasoned board members with newly appointed ones for mentorship, making introductions, explaining board practices, and encouraging early and active participation. The following article describes how this strategy works.
 - [Board Mentors, A Strategy for Engaging New Board Members](#)

2. Provide opportunities for learning at monthly meetings, quarterly trainings, and retreats to keep the board focused on building skills and knowledge.

- Begin board meetings with “mission moments” to keep board members in touch with their shared purpose and the patients they represent. This article explains the value of asking your board members for success stories at meeting start.
 - [Best Way to Start a Meeting: The Mission Moment](#)
- Incorporate mini training topics into your monthly board meetings to emphasize learning as a team. This minutes template includes an agenda item for training.
 - [Board of Directors Meeting Minutes Template](#)
- Schedule quarterly or semi-annual training for your board members to maintain frequent skills building. This resource helps you plan by training topic.
 - [Board Training Topics and Schedule](#)
- Maintain a schedule of HRSA required policy approvals to reinforce members’ understanding of the compliance policy and oversight role such as the following “at-a-glance” form.
 - [Record of Health Center Policy Approval at a Glance](#)

- Encourage board member communication so they stay connected to each other and the health center.
 - Use email distribution lists and messaging platforms such as Microsoft Teams to support effective communication among board members.
 - Use document sharing platforms such as Microsoft SharePoint to easily distribute important board materials and meeting packets.
 - Share health center newsletters to keep them up to date with health center activities and news.
 - Provide social opportunities, such as breakfast events for board members.
- If conducting virtual board retreats, research best practices for virtual facilitation and incorporate activities to share in online spaces.
 - The resource, [Virtual Board Retreats](#) outlines how health center boards can plan a virtual retreat and offers some tools and templates that can be customized by boards.
 - Include simple, fun games and activities in your board meetings. Several tools are available for engaging participants in productive activities during virtual meetings, such as responding to a poll or writing on a whiteboard. Please note that internet platforms frequently offer both free and paid subscriptions. Some virtual engagement ideas include: [FunRetrospectives.com](#) and [6 Super Fun Activities for Your Next Virtual Meeting](#).
 - Virtual Polling Platform Examples: [Poll Everywhere](#) and [Mentimeter](#) (Both free and paid versions are available.)
 - Virtual Whiteboard Platform Examples: [Jamboard](#) and [Miro](#) (Both free and paid versions are available.)
- Develop the board's understanding and connection to special population patients.
 - Provide opportunities for board members to learn about and engage with their special population patients to deepen understanding and stimulate board action to better serve these communities.
 - As an example, [NCFH](#) provides consultations and trainings for migrant health center boards.
 - Health centers have reported success in providing opportunities for board members to attend community activities designed for connection with special population patients.

3. Evaluate your Board's development and training needs to identify gaps.

One of the key aspects of assessing and monitoring health center performance is evaluating board members' actions and how well the board is fulfilling the health center mission. Another purpose of board self-assessment is to inform the development of the annual training plan. Self-evaluation identifies those areas in which the board can improve processes, accountability, and communication among board members, as well as the CEO or Executive Director of the health center. By establishing the practice of periodic self-evaluation, board members are able to ensure that they make progress in performing their function as board members and do not become stagnant in their positions. In addition, self-evaluation is an excellent tool to use when preparing for health center performance reviews. Results of a board self-evaluation can be key in helping the board identify areas for improvement and the resources needed to make changes. NCFH has prepared the following sample form:

- Sample Self-evaluations in [English](#) and [Spanish](#)