

The Migratory and Seasonal Agricultural Worker Perspective on Health Center Boards:

*Good Practices in Recruiting, Retaining,
Engaging, and Training Board Members*



NATIONAL ASSOCIATION OF
Community Health Centers®

THANK YOU TO ALL COMMUNITY HEALTH CENTERS

#ThankYouCHCs

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Objectives

1. Describe the importance of the consumer-majority, community-based board model for health centers and the significance of special population representation in health center governance.
2. Consider strategies for recruiting, retaining, and engaging the migratory and seasonal agricultural worker perspective on health center boards, as well as strategies for ongoing board training and development.
3. Outline various resources to support boards and board members.

Speakers



Angel Calderon
Past Vice-Chair,
Secretary and
Board Member,
Ampla Health



Alicia Gonzales,
MSSW
Chief Operating
Officer, National
Center for
Farmworker
Health



Emily Heard,
Director, Health
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Eleace Sawyers,
MAcc, MPA, CHC,
Chief Executive
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Health Partnership
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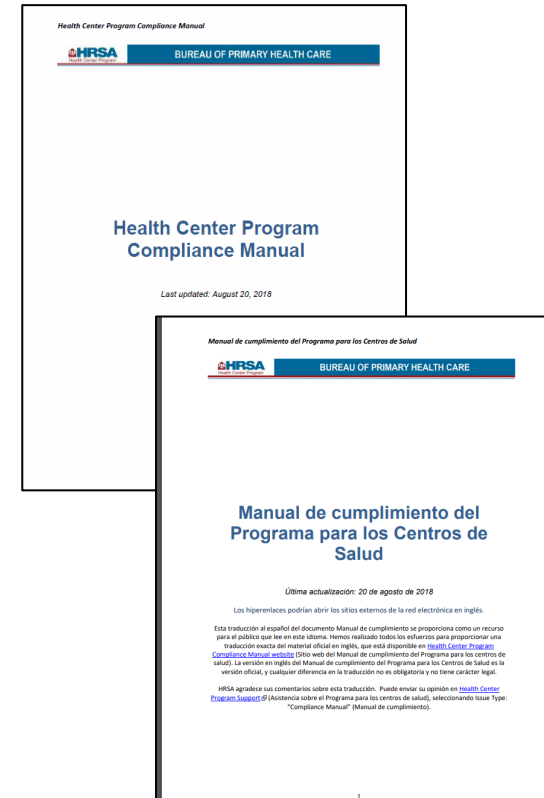


Mary Zelazny, MBA,
Chief Executive
Officer
Finger Lakes
Community Health

Health Resources and Services Administration (HRSA) Health Center Program Requirements

Chapter 20: Board Composition Highlights regarding Special Populations

- 51% patient majority
 - Received at least 1 service in past 24 months that generated health center visit (service and site in scope of project)
 - Patient members of the board represent the individuals who are served by the health center in terms of demographic factors
- Representative(s) from or for each of the special population(s) for those health centers that receive any award/designation under one or more of the special populations section 330 subparts, 330(g), (h), and/or (i)
- Representation could include advocates for the health center's section 330 (g), (h), or (i) patient population (for example, those who have personally experienced being a member of, have expertise about, or work closely with the current special population).



See Chapter 20 of the Health Center Program Compliance Manual for more details

English: <https://bphc.hrsa.gov/programrequirements/compliancemanual/chapter-20.html#titletop>

Spanish: <https://bphc.hrsa.gov/sites/default/files/bphc/programrequirements/pdf/health-center-manual-spanish.pdf>

Panel Perspectives: *Key Benefits of Special Population Representation in Governance*



Angel Calderon,
Ampla Health



Eleace Sawyers,
Community Health
Partnership of Illinois



Mary Zelazny,
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Board Member Recruitment

Purpose: Finding individuals who are the right fit to serve on the board at the right time



Board



Governance
Committee (or
equivalent)



CEO

Board Member Recruitment

Special Population Considerations

Identifying Candidates

- Use outreach staff/Community Health Workers (CHWs) to invite and refer
- Advertise/use Spanish language radio (Public Service Announcements)
- Community Partner/stakeholder recommendations
- Use a committee, advisory council or board of directors to publicize openings
- Ask the front desk or administration area to support the call for board members
- Seek suggestions from community members, board members, and employees

Recruitment Ideas

- Have current board members contact potential members
- Have the right recruitment material and processes such as:
 - Tour the facility with a senior staff person and/or board member to learn about the organization
 - A short board recruitment video
 - Opportunity to attend a board meeting to get an idea of how the board makes decisions and delegates responsibilities
 - Allow candidates to have a conversation with one or more board members to ask and answer questions

Panel Perspectives: *Board Recruitment & the Migratory and Seasonal Agricultural Worker Perspective*



Angel Calderon,
Ampla Health



Eleace Sawyers,
Community Health
Partnership of Illinois



Mary Zelazny,
Finger Lakes
Community Health

What is Working for Your Board?

- What *board recruitment* practices are working well to ensure the migratory and seasonal agricultural worker perspective on your board?



Considerations Related to Retention and Engagement

Special Population Considerations

- Work Hours
- Transportation
- Spare time
- Child Care
- Limited English Proficiency
- Intimidation/Inexperience with the Financial Topics
- Immigration Status
- Cultural influences may inhibit advocating publicly
- Cultural influences may restrict participation by women or young people
- Virtual considerations

Panel Discussion: *Addressing Challenges, Retention & Engagement*



Angel Calderon,
Ampla Health



Eleace Sawyers,
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Partnership of Illinois



Mary Zelazny,
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Community Health

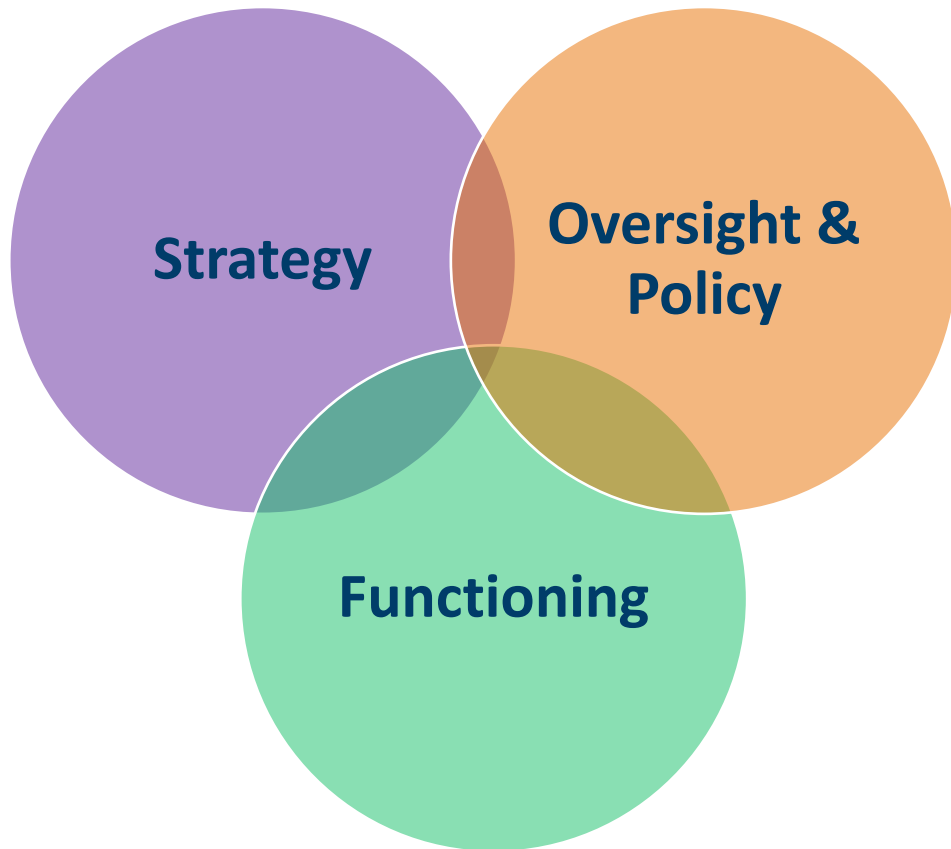


Board Member Orientation

Purpose: Prepares new board members for their new volunteer role

- Extend a *personal welcome*
- Provide “*board handbook*” with background materials or training session
 - Are materials provided in an easy-to-read format?
 - Available in Spanish?
- Consider format and the best *approach* for your board members—
 - 1) *Multi-session approach* – Several short sessions at start of board service
 - 2) *Staggered Approach* – Several short sessions over an extended period of time
 - 3) *Customized Approach* – Tailored for the needs of an individual board member
- Provide a board mentor/buddy

Health Center Board Roles: Plan for Ongoing Board Development



Strategy

- Strategic Board Composition
- Strategic Planning & Thinking

Functioning

- Board Meetings
- Board Committees
- Board Culture

Oversight & Policy

- Provide Oversight
 - CEO Oversight & Partnership
 - Corporate Compliance
 - Health Center Program Compliance
 - Financial
 - Quality
 - Risk Management
- Approve Policy

Board Assessment

Approach

- Purpose: Identify needs, training and satisfaction level
- Consider Frequency
- Consider approach for analysis and sharing of results
- Guides development of board training plan

Samples

- NCFH has Samples and Resources, [NCFH Health Center Toolbox](#)
- [NACHC Governance Guide for Health Center Boards Appendix 17](#)

Ongoing Board Training

Purpose: *Equips all board members with information and knowledge needed to govern*

- Integrate in board meetings
- Make training available in Spanish when possible
- Use board retreats
- Consider participation in NCFH Learning Collaboratives
- Use NACHC and NCFH Resources and Tools

Sample Board Training Plan

| Month | Forum | Topic and Resources | Resources and Approach |
|--------|-----------------------|----------------------------------|--|
| June | Board Meeting | Telehealth and Governance | Staff Presentation and NACHC Article |
| July | Board Orientation | Financial Statement Fundamentals | Use NCFH and NACHC Modules |
| August | Virtual Board Retreat | Health Center Strategy | Use NACHC discussion questions from NACHC article “Focusing on the Future” |

Panel Discussion: *Board Orientation Training and Development*



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Ampla Health



Eleace Sawyers,
Community Health
Partnership of Illinois



Mary Zelazny,
Finger Lakes
Community Health

What is Working for Your Board?

- What *board orientation* practices are working well?
- How is your board using ongoing *board training and development*?



Health Center Resource Clearinghouse

<https://www.healthcenterinfo.org/>

The screenshot shows the Health Center Resource Clearinghouse website. The browser address bar displays 'healthcenterinfo.org'. The navigation menu includes 'ABOUT', 'PARTNERS', 'SEARCH', 'LEARNING', 'PRIORITY TOPICS', 'PROMISING PRACTICES', and 'CONNECT'. A red banner at the top reads 'New Resources: COVID-19 Home Test Kits and Masks Page | HRSA Health Center COVID-19 N95 Mask Program'. Below this is a search bar with the text 'Search the Clearinghouse: Enter Search Terms Here' and a 'SEARCH' button. The main content area features a large image of a healthcare worker in a blue gown and mask interacting with an elderly woman wearing a white face mask. Overlaid on this image is the text 'Quick Finds: Use the links below to find resources on key topics'. To the left of the image is a sidebar menu with the following items: 'COVID-19 Resources:', 'Test Kits and Masks', 'COVID-19 Promising Practices', 'Get Prepared: Vaccine Distribution', 'Emergency Management and Operations', 'Telehealth', 'Governance' (circled in red), 'Special and Vulnerable Populations', 'Financial Management', 'All COVID-19 Resources from the Clearinghouse', and 'Partner COVID-19 Resources'. At the bottom of the sidebar is a red button labeled 'COVID-19 Resource Page'. Below the main image is a grid of 'Quick Finds' categories: 'Clinical Issues', 'Operations', 'Telehealth', 'Emerging Issues: COVID-19, More...', 'Promising/Best Practices', 'Value-Based Health Care Transformation', 'Finance', 'Quality Improvement', 'Workforce', 'Governance' (circled in red), 'Social Determinants of Health', and 'HIT/Data', 'Special & Vulnerable Populations'.

National Resource Center for Health Center Training and Technical Assistance (TTA)

Envisioning a world where every health center thrives and strengthens its community

WHAT

type of training is offered to support health center governance?

NACHC's Health Center Governance training programs offer useful and timely governing strategies to empower health center boards as they navigate the complex health care environment. Board member boot camps, online videos and modules, and essential resources are available. All resources and programs highlight nationally recognized practices. Topics are constantly updated so board members can address today's most critical priorities while identifying strategies for long-term health center success.



WHO

benefits from NACHC's health center governance trainings?

Current, future, and new health center board members. Primary Care Association (PCA), and Health Center Controlled Network (HCCN) partners also benefit.

WHAT'S OFFERED?

Health Center Governance Fundamentals



Foundational resources that introduce the fundamentals of health center board roles:

- **Governance Guide for Health Center Boards** (English/ Spanish)
- **Health Center Board Roles** (video)
- **Health Center Boards: Benefits to Health Centers** (English/Spanish)
- **New Board Member Orientation Template and Facilitator Guide*** (English/Spanish)

Board Member Training & Events

- **Board Member Boot Camp***
- **Policy & Issues Forum**
- **Community Health Institute & Expo**

Events

For up-to-date events and training programs, go to NACHC's **TTA Calendar of Events**, register for email updates, or contact us at trainings@nachc.org

* Indicates projects not supported by HRSA.

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WHY

are NACHC's governance training programs helpful?

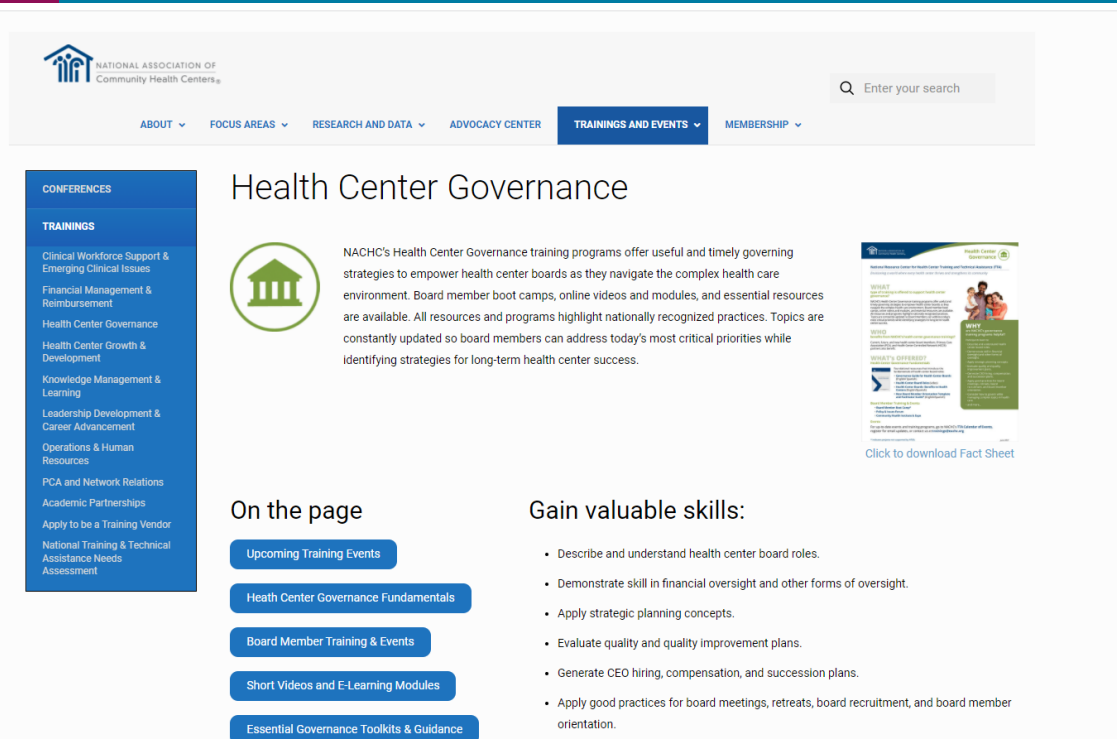
Participants learn to:

- Describe and understand health center board roles.
- Demonstrate skill in financial oversight and other forms of oversight.
- Apply strategic planning concepts.
- Evaluate quality and quality improvement plans.
- Generate CEO hiring, compensation, and succession plans.
- Apply good practices for board meetings, retreats, board recruitment, and board member orientation.
- Consider how to govern while managing complex topics in care.
- and more...

Health Center Governance Resource Page and Fact Sheet

Over 50 tools and resources available from NACHC!

<https://www.nachc.org/trainings-and-conferences/governance/>



The screenshot shows the NACHC website's 'Health Center Governance' page. At the top, there is a navigation bar with links for 'ABOUT', 'FOCUS AREAS', 'RESEARCH AND DATA', 'ADVOCACY CENTER', 'TRAININGS AND EVENTS', and 'MEMBERSHIP'. A search bar is also present. The main content area features a large heading 'Health Center Governance' and a green icon of a building. Below this, a paragraph describes the training programs. To the left, there is a sidebar menu with categories like 'CONFERENCES', 'TRAININGS', 'Clinical Workforce Support & Emerging Clinical Issues', 'Financial Management & Reimbursement', 'Health Center Governance', 'Health Center Growth & Development', 'Knowledge Management & Learning', 'Leadership Development & Career Advancement', 'Operations & Human Resources', 'PCA and Network Relations', 'Academic Partnerships', 'Apply to be a Training Vendor', and 'National Training & Technical Assistance Needs Assessment'. On the right, there is a 'Click to download Fact Sheet' link and a small thumbnail of the fact sheet. Below the main content, there are two sections: 'On the page' with buttons for 'Upcoming Training Events', 'Health Center Governance Fundamentals', 'Board Member Training & Events', 'Short Videos and E-Learning Modules', and 'Essential Governance Toolkits & Guidance'; and 'Gain valuable skills:' with a list of skills.



NACHC's Health Center Governance training programs offer useful and timely governing strategies to empower health center boards as they navigate the complex health care environment. Board member boot camps, online videos and modules, and essential resources are available. All resources and programs highlight nationally recognized practices. Topics are constantly updated so board members can address today's most critical priorities while identifying strategies for long-term health center success.



Click to download Fact Sheet

On the page

Upcoming Training Events

Health Center Governance Fundamentals

Board Member Training & Events

Short Videos and E-Learning Modules

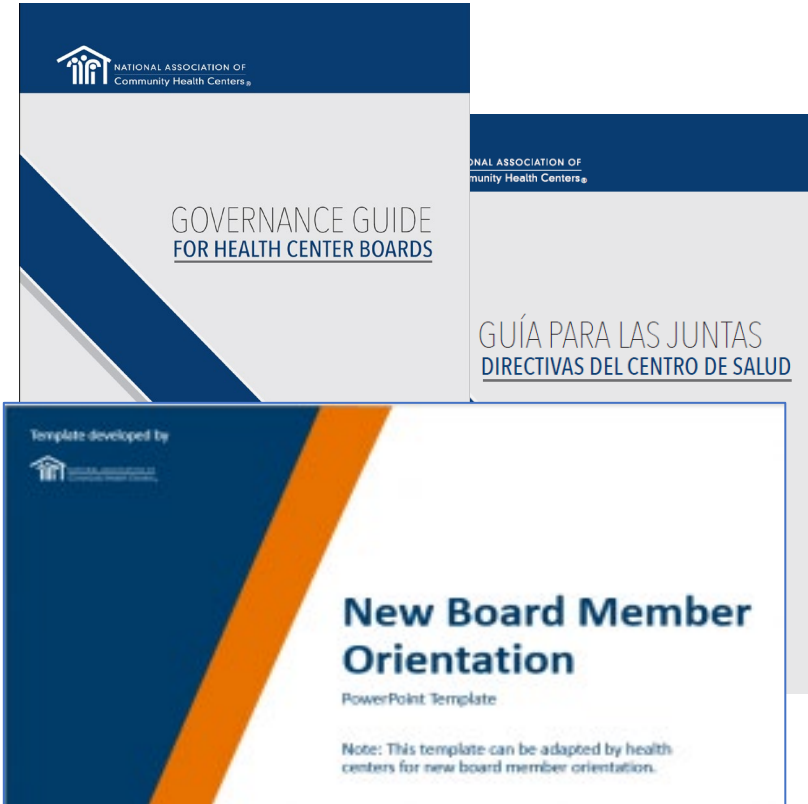
Essential Governance Toolkits & Guidance

Gain valuable skills:

- Describe and understand health center board roles.
- Demonstrate skill in financial oversight and other forms of oversight.
- Apply strategic planning concepts.
- Evaluate quality and quality improvement plans.
- Generate CEO hiring, compensation, and succession plans.
- Apply good practices for board meetings, retreats, board recruitment, and board member orientation.



Health Center Governance Resources – Foundational Resources



Foundational resources introduce the fundamentals of health center board roles and are among the most utilized tools by health centers.

- **Governance Guide for Health Center Boards** (English + Spanish)
 - 11 focus areas
 - 20 customizable tools
- **Health Center Board Roles** (video in English, coming soon in Spanish through partnership with National Center for Farmworker Health)
- **Board Member Orientation PowerPoint Template and Facilitator Guide** (English + Spanish) – can be customized by health centers for board orientation!
- **Orienting New Health Center Board Members During the Pandemic**



Health Center Governance Resources – Board Recruitment

NCFH Health Center Toolbox

GOVERNANCE

Becoming a Leader in Migrant Health

Board of Directors

- Recruitment Grid
- Orientation Checklist
- Minutes Template - English & Spanish
- Record of Policy Approval at a Glance
- Training Topics
- Self Evaluations
- Self Evaluations Sample - English & Spanish



GOVERNANCE GUIDE FOR HEALTH CENTER BOARDS

GUÍA PARA LAS JUNTAS DIRECTIVAS DEL CENTRO DE SALUD

COVID-19 and Health Center Boards

Recruiting and Retaining Board Members: Considerations During and Immediately Post-Pandemic

COVID-19 y Juntas de Centros de Salud

Contratación y retención de miembros de la junta: consideraciones durante e inmediatamente después de la pandemia

• Governance Guide for Health Center Boards (English + Spanish)

– Chapter 2

– Various tools in appendix

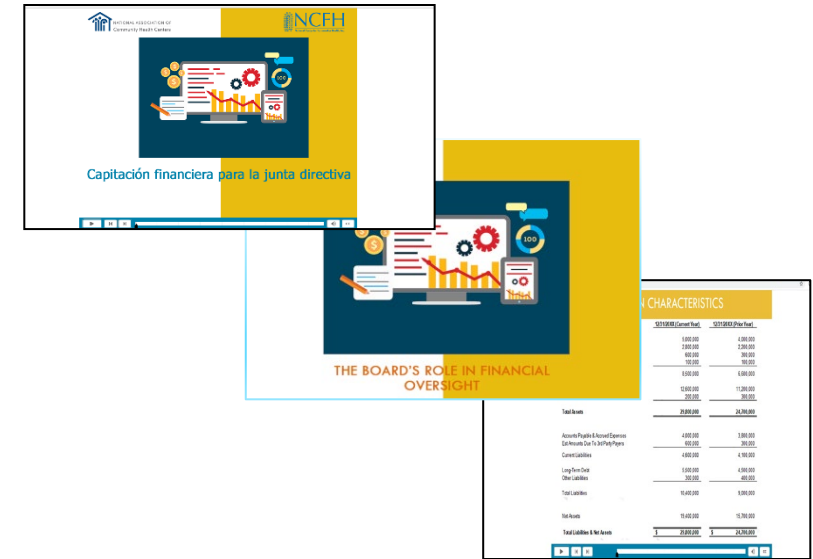
• Recruiting and Retaining Board Members: Considerations During and Immediately Post-Pandemic (English and Spanish)

Videos and E-learning modules

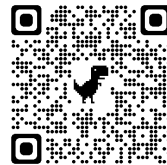
Modules on Board Financial Oversight/ Modulos en capacitación financiera para la junta directiva

This five-part series addresses:

- the board's role in financial oversight,
- how to read key financial statements, and
- highlights some key financial performance indicators typically monitored by health center boards.



English



Spanish



Thank you!



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National Association of
Community Health Centers



Appendix: Additional Resources



Videos and E-learning modules

- **Strategic Planning Focused Modules**

- [The Board's Role in the Needs Assessment](#)
- [The Board's Role in Strategic Planning](#)
- [The Board's Role in Strategic Planning: Case Study](#)
- [The Board's Role in Strategic Planning: A Case Study on Cherokee Health](#)

- **Diversity, Equity, and Inclusion**

- [Diversity, Equity, Inclusion & Justice in Health Center Governance](#)
- [Board Actions Combatting Racism: Case Study of Lowell Community Health Center](#)





Health Center Governance – COVID Response*

Various articles and videos to support boards (see <https://www.healthcenterinfo.org/priority-topics/covid-19/covid-19-resources-governance/>).

- 1. Understanding the Impact of COVID-19 on the Health Center** – articles addressing impact on risk management oversight, quality oversight, audits, and various videos about financial considerations.
- 2. Framing the Future of the Health Center in a COVID-19 and post-COVID Environment** – articles on strategic planning and thinking, telehealth, and video on strategic financial planning.
- 3. Strengthening Health Center Governance Processes** – articles Orienting New Health Center Board Members During the Pandemic, Virtual Board Retreats, and Recruiting and Retaining Board Members During and Post-Pandemic.
- 4. Looking Beyond the Pandemic** – articles on the board's role related to Business Continuity Planning and Health Center Program Compliance, as well as Hybrid Board Meetings.





Toolkits and Briefs

CEO Succession and Transition

- [CEO Succession Planning: A Toolkit for Health Center Boards](#)
- [Navigating CEO Transitions: A Toolkit for Health Center Boards](#)

Payment Reform Fundamentals for Boards

Legal Considerations

- [Ten FAQs About Health Center Boards & the CMS Omnibus COVID-19 Staff Vaccination Interim Final Rule](#)
- [Conflicts of Interest](#)
- [CEO Compensation](#)
- [Board Role in Corporate Consolidation](#)
- [Legal Lessons Learned & the Pandemic](#)
- And more

