

STEPS TO MAXIMIZE THE VALUE OF YOUR BOARD RETREAT

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SUMMARY

Maximizing the value of a board retreat takes intentional planning. This article emphasizes the vital importance of preparation and follow-up, and provides tips related to the four stages of a retreat: Logistics Planning, Participant Preparation, Retreat with an Action Plan Product, and Maintaining Momentum.



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Board retreats can be a catalyst for transformational change, but rarely are they successful without advance planning.

Consider first, that a retreat's value is maximized with preparation and follow-up on the parts of all participants. Second, plan for there to be an Action Plan as the outcome of every retreat. Setting that expectation will move the meeting into a planning mode, instead of

a discussion mode. The difference can be significant.

There are four basic stages to a retreat:

- A. Logistics Planning
- B. Participant Preparation
- C. Retreat with Action Plan Product
- D. Maintaining Momentum

Logistics Planning

What

- What is your primary purpose for the meeting?
- What secondary goals might you have (new member inculturation, team building, decisions about a specific program, etc)?

Who

- Based upon the purpose, who must participate? What other participants might be helpful, but not necessary?
- Who will facilitate your meeting? (ideally a neutral third party, skilled in planning and knowledgeable about hospice and palliative care)

Where

- What location will help inspire creativity and take people out of their usual mindset?

When

- What dates/times will maximize participation, yet allow sufficient lead time to allow for participant preparation, and to have sufficient on-site time to thoroughly address your agenda (Despite a common tendency to pick a date first, you are short-changing yourselves if you do this without first considering who will facilitate, what advance preparation will be appropriate and how much time will be needed to address an agenda that meets your goals for the meeting.)

- Many organizations find it helpful to break a retreat over two successive days to allow a time for reflection between the first and second part of the meeting. This can also allow for social time at the end of Day 1 that is often important in strengthening bonds between board members.

Participant Preparation

As noted above, the value of a retreat is directly related to the preparation and advance thinking that participants put in. As part of the agenda development, your facilitator should be recommending one or more of the following:

1. Analysis/Assessment of some type that could include one or more of the following:
 - Analysis of Market Data
 - Referral Source Interviews
 - Operations and Finance Assessment
 - Board Self-Assessment
2. Reading or viewing materials that tee up agenda items:
 - Articles
 - Videos
3. Panel presentations - during the retreat, a panel can present viewpoints from external parties such as referral sources, strategic partners, or associations.

The Action Planning Retreat

The facilitator should plan an agenda that allows for full participation and that addresses both the primary and secondary purposes of the meeting. The output should be a set of action items that represent the top priorities of the board with respect to the retreat's areas of focus. A part of that plan should be assignment of responsibility to maintain momentum on those priorities.

Retreat Follow-Up

Following the retreat, the following steps will help ensure the value of the time spent planning:

- Fleshing out the plan by staff and/or board committee/task force to finalize responsibilities and timelines
- Plans for how the board will be provided updates on progress
- Checkpoints with the facilitator to ensure progress and help overcome any barriers/challenges which arise as the action plan is implemented.

Conclusion

Above all, ensure that you plan for all four key elements of a successful retreat up front: logistics, preparation, action plan and follow-up. That planning will make a world of difference in creating solid value from the time spent together during the retreat.

The Hospice Governance Academy provides just the support you need to help get your board firing on all cylinders.

- Fundamentals Courses are perfect for making sure your board has a consistent understanding of the basics.
- Spotlight Interviews keeps your board informed on the latest topics facing hospices today.

HGA webinars can enhance your retreat by providing hospice-specific board training that can continue independently after the retreat is over.

Contact Inegriti3D to find out more about how we can assist in creating a retreat with solid value.