

LEADERSHIP PERSPECTIVES

Maximize the Value of Your Board Retreat

Board retreats are a great way for trustees to brainstorm ideas about the organization's future, strengthen their understanding of the organization's challenges, and develop a sense of teamwork and camaraderie. How can boards ensure that their retreats are a valuable use of leadership time and resources with meaningful outcomes?

Board retreats are one of the most important leadership efforts governing teams participate in. Few other activities offer boards the opportunity to think, focus and plan the way a retreat can. To be effective, the retreat must be carefully planned, coordinated and executed, otherwise it's simply another long meeting.

Board retreats should be planned with a specific purpose in mind. For example, *"to involve board members, the administrative team and medical staff leadership in the development of a meaningful long-term vision that will lead the development of strategies for 2006-2010."* Once a clear purpose has been determined, specific action steps may be taken, including seeking out all participants' ideas, viewpoints and perspectives prior to the retreat. This intelligence will help to ensure productive retreat dialogue and discussion. In addition, because a productive retreat will typically yield a long list of potential actions to be taken, it's a good idea to conduct a post-retreat follow-up survey to further prioritize potential directions and ideas.

Pre-Retreat Input

Seeking pre-retreat input not only helps the retreat facilitator understand the issues that are most important to discuss, but it also ensures that participants come to the meeting with ideas about the organization's current strategy, challenges the organization is facing, and critical success factors that must be addressed. Ideas should be gathered in advance from several key stakeholders, including trustees, the administrative team and physicians, using a pre-retreat survey. Opinions should be sought out on specific topics that will be discussed at the retreat. Potential areas of focus in the survey may include:

- Organizational strengths, weaknesses, opportunities and threats;

- Identification of critical issues facing the hospital;
- Actions necessary to be taken to address current challenges and projected future challenges;
- A review of the mission and vision statements, and their applicability to the organization and its environment today and in the future;
- Rating of the organization's existing strategies; and
- Specific objectives to be accomplished as a result of the retreat.

Participant ideas and opinions may be gathered using a variety of methods, such as a Web-based survey, written survey or personal interviews. The results of the research should be presented at the beginning of the retreat, setting the stage for a session based on participant ideas, issues, priorities and needs. The results can also be used as a starting point for discussion about specific issues probed in the survey, ensuring productive dialogue by giving participants ideas to respond to and build upon.

Ensuring Productive Retreat Dialogue

The retreat agenda should be developed based on the results of the pre-retreat input. The session should consist of discussion about the issues most important to the organization's board, administrative team and medical staff, and should include prioritization of specific strategies and

goals. The dialogue will lead to a list of ideas, goals or initiatives that may be prioritized and finalized following the retreat.

Breakout groups. Depending on the number of critical issues emerging from the pre-retreat research and the number of retreat participants, it may be beneficial to use breakout groups as a way to discuss multiple issues in more depth. If breakout groups are expected to be utilized, a "discussion guide" should be developed to stimulate the groups' thinking and deliberations. The discussion guide should include a list of the topics to be discussed, questions to be answered, and specific outcomes to be achieved from the groups' discussion.

Each breakout group should appoint a moderator to facilitate discussion and a recorder to take notes on a flip chart. Following the discussion, the groups should convene for the moderators' reports, full group discussion and specific recommendations.

Prioritization of critical issues, goals or strategies. Full group or breakout discussions may result in a long list of key issues facing the organization, and several potential strategies to address these issues. In order to focus the organization's attention on the most critical issues and strategies, the ideas must be prioritized. Prioritization can be done in several ways, using either "low-tech" or "high-tech" alternatives.

- One "low-tech" option is to list the ideas, issues, goals or strategies identified on flip charts and post them around the room. Each retreat participant is given an equal number of colored stickers, which they place next to the items they believe are most important. As an alternative, participants may simply place a specified number of check marks next

Ensuring Successful Breakout Discussions

Breakout groups can be an excellent way to encourage broad participation among retreat participants, maximize the use of limited retreat time and develop the greatest number of ideas. However, if not planned and managed properly, a breakout group discussion can turn into an unproductive discussion among participants that may result in no real deliverables. To ensure the time is productive, breakout groups should have:

- A very specific topic to discuss;
- Specific questions to discuss and respond to;
- A facilitator to moderate the discussion and keep conversation on-task; and
- A recorder to take notes for presenting the results to the entire group.

to the items they believe have the highest value or the greatest priority.

- One “high tech” option is to utilize an electronic voting system. Each participant uses a wireless keypad to respond to questions presented on a screen, using specialized software integrated into PowerPoint. Participants can rate and rank ideas, and immediately see the results of their anonymous input.

Both the “low-tech” and “high-tech” options give everyone an opportunity to share their opinions and stimulate dialogue, as they result in an immediate understanding of participants’ views.

Retreat Evaluation

Conducting a retreat evaluation at the end of the session encourages participants to share their opinions about the effectiveness of the meeting, and provides valuable feedback essential to improving subsequent retreats. A typical retreat evaluation may ask participants to rate specific components of the retreat, such as:

- Overall organization and flow of the retreat;
- Value of the pre-retreat research in helping participants prepare their thoughts and ideas about retreat topics;
- Value of the pre-retreat research results in stimulating retreat discussion;
- Overall participation, interaction and teamwork among retreat participants;
- Quality of discussion and dialogue;
- Success of the retreat in helping to define the organization’s goals and strategies;
- Value of breakout groups (if used); and
- Success of the retreat in developing a working consensus on goals and strategies.

The retreat evaluation may also ask participants’ satisfaction with the retreat location and amenities, as well as open-ended questions, such as:

- What was the most beneficial outcome of the retreat?
- What ideas do you have for future retreats?

Sample Pre-Retreat Survey

SWOT Analysis

- What are the organization’s three greatest strengths? What can we do to best maximize these strengths?
- What are the organization’s three most significant weaknesses? What can we do to minimize or eliminate these weaknesses?
- What are the three greatest opportunities that the organization may be able to capitalize on (e.g. community relationships, partnerships with other providers, information technology, service expansion, etc.)? What can we do to successfully capitalize on these opportunities?
- What are the three most significant threats facing the hospital (e.g. regulation, competition, workforce shortage, etc.)? What can we do to eliminate these threats?

Critical Issues

Please rank the importance of addressing the following issues, using a scale of critical, somewhat important, not important or not sure. (*list specific issues, e.g. enhancing information technology; disseminating quality results to payers and consumers; strengthening ties with physicians; improving the workplace environment; expanding services to meet demand, etc.*)

Open-ended question: What other issues are important to be considered in ensuring the future success of the organization?

Open-ended question: What is the greatest challenge to the organization’s future growth and competitiveness?

Forces for Change

Please indicate how critical the following are for ensuring the future success of the organization, using a scale of critical, somewhat important, not important or not sure. (*list specific issues, e.g. attracting and retaining a workforce to ensure the organization can meet future market needs; positioning the organization to thrive in a consumer-directed purchasing market; ability to clearly demonstrate the community benefit the organization provides; ability to ensure the availability of capital adequate to meet future needs, etc.*)

Open-ended question: What else is critical for the organization to understand and effectively deal with?

Mission and Vision

Open-ended question: Will our mission and vision continue to be appropriate and viable in the year 2012? If not, how do you believe the mission and vision should be different?

Strategies and Goals

Please indicate how successful you believe our organization has been to-date in achieving our goals, using a scale of very successful, somewhat successful, not successful or don’t know. (*list the hospital’s specific goals*)

Open-ended question: Do you believe the successful achievement of these goals will result in attainment of our mission and vision? If not, what goals do you believe are missing, and should be incorporated into our strategic thinking?

The Retreat

Open-ended question: What do you want to accomplish at the retreat?

Retreat Follow-Up Survey

When critical issues and strategies are discussed and prioritized at the retreat, a brief follow-up survey can help to further clarify participants’ opinions and create a roadmap for next steps. For example, the top ten most critical strategic issues may be identified at the retreat, and a broad range of ideas for strategies and objectives to address those issues may be developed. But deeper analysis may need to be done, such as determining the implications of the issues, the urgency of strategy implementation, resources required, etc. The hospital may want to initiate a follow-up survey that solicits further input from the board, administrative and medical staff

leaders. By asking participants to complete the follow-up survey following the retreat, participants are able to share their opinions in a more deliberative, thoughtful manner.

Post-Retreat Follow-Up Work

The retreat process wraps up with a post-retreat meeting to review the results of the follow-up survey, and take official action on the retreat outcomes, if required. This may be a regular board meeting or an extension of a regular board meeting. If desired, based on the scope of the survey results, a special board meeting may be required with a sole agenda item to discuss the survey findings and determine board action.