

How to Plan, Organize, and Conduct your next Board / Staff Retreat

By Stephen C. Tweed, CSP

Research shows that a major challenge facing healthcare organizations today is a lack of shared vision and direction between executive leadership and members of the board of directors. Quite often, the CEO has a clear idea of where she or he would like to take the organization, but that vision is not seen and shared by members of the board. This is frequently the case when board members do not fully understand all of the issues facing healthcare today.

One way to solve this problem is to conduct a board retreat as a means of involving board members in setting strategy and direction. The board and executive leadership team set aside a block of uninterrupted time to clarify mission, vision, and values, discuss the forces and trends shaping the industry, define the strategic direction of the organization, or develop the leadership competencies of board members and executive leadership. An experienced facilitator leads the group through a series of discussions and helps document the outcome. The result is a strategy statement that provides clear focus and direction for the future.

Four Types of Retreats

In our work with boards and leadership teams of not-for-profit healthcare organizations over the past 20 years, we have identified four frequently used types of

retreats. It's particularly important when planning that you clearly define what it is that you want to accomplish and what type of retreat you want to conduct.

The Trends Retreat

This retreat is designed to provide board members and executives with information about the forces and trends that are shaping the future of healthcare. It's a great time to learn about what's going on in other areas of the country, and in other highly successful organizations. For **The Trends Retreat**, you will usually bring in a nationally known outside expert to speak on the major issues facing healthcare, or the changes that are taking place. In selecting your presenter, you want someone who is an expert on the trends, who is an effective speaker, and who can facilitate a discussion among board members and staff.

The Visioning Retreat

The Visioning Retreat is designed to get your board and executive team thinking about the future. We define "vision" as... "a consciously created fantasy of what you aspire to be." It's a description of what you believe will be a more favorable future. For **The Visioning Retreat**, you will want to bring in an outside facilitator who can stimulate the thinking of your group and get them to articulate their desirable future. The facilitator needs to provide a method for capturing the ideas and visions of the team, and providing you with a summary of the results.

The Refocusing RetreatTM

Many healthcare leadership teams go off-site once a year or so to refocus the organization. In today's changing healthcare environment, it's easy for board and staff to become distracted, diluted, and out of focus. The purpose of this retreat is to bring back into focus the thoughts, actions, and resources of the group in order to achieve

your mission and vision and to gain competitive advantage in the marketplace. You'll want to select a facilitator who can bring you a proven process for strategic thinking and planning. *The Refocusing Retreat*[™] may be a stand-alone event, or it can be part of a more complete strategic refocusing process.

The Leadership Retreat

The Leadership Retreat is designed to clarify and improve the way board members and executive staff work together. It is an opportunity to clarify the role of board and management, and to facilitate teambuilding and communication. It is also a time to clarify what is expected of board members. You'll want to select a facilitator who has experience working with not-for-profit healthcare boards and their executive leadership teams.

The Role of the Facilitator

It is virtually impossible for one person to serve as both the leader of the group and the facilitator of the process. For that reason, it's very important to have a person from outside the group who will facilitate your retreat. As an objective outsider, the facilitator is responsible for:

- Establishing the agenda
- Presenting information
- Stimulating thinking
- Facilitating the storyboarding process
- Keeping the group focused on it's tasks
- Enforcing the rules for creative and critical thinking
- Ensuring equal participation
- Providing personal guidance to the CEO

- Documenting the results of the retreat.

Storyboarding: A Tool for Creative Thinking and Planning

A very powerful tool for your board retreat is storyboarding. Made popular by Walt Disney, this technique uses index cards, push pins, felt markers, and large foam boards to make ideas visible, stimulate creativity, and capture the results of in-depth discussions. It is a flexible way to organize and reorganize thoughts and action plans. It is a way to get people involved, committed, and excited about the future of the organization.

Documenting the Results

An important part of the board retreat is to accurately document the discussion that took place. Storyboarding can make the documenting task easier. The facilitator takes the cards from the storyboard back to the office and creates a computerized summary. Then members of the retreat team review the document and make any refinements before it is communicated and acted upon.

Your next board retreat can be a valuable tool for bringing together the key leaders of your organization to begin the process of creating a more favorable future. You can begin right now to use these ideas to plan and organize this powerful tool to help grow your business and get ready for the future. As Winston Churchill once said, “One should always look ahead. However, it is difficult to look further than one can see.” It is not our purpose to predict the future, but to create it.

About the Author: *Stephen C. Tweed, CSP*, is a nationally known healthcare strategist, professional speaker, author, and consultant. He works with healthcare organizations who want to grow and with healthcare leaders who want to get ready for the future. He is a frequent speaker and facilitator of board and executive leadership retreats for not-for-profit healthcare organizations. He is a principal in the firm of **Tweed Jeffries, LLC** in Louisville, KY. He also serves as **Chairman and CEO** of *Leading Home Care... A Tweed Jeffries Company*, and as **President** of the **National Speakers Association**. He can be reached at 502-339-0653 or Stephen@leadinghomecare.com

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