

Governance Notes

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Reimagining the Board Retreat: Design for Impact, Not Updates

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Non-profit healthcare organizations must rethink the annual board retreat

to create a high-impact and high-engagement experience. Too often, these gatherings become checkbox exercises—focused on reviewing past performance and glancing at future opportunities rather than driving meaningful progress. However, a board retreat can be an invigorating experience that not only fosters reflection but also illuminates the mission and inspires forward-thinking innovation. To fully harness the power of a reimagined retreat, organizations should prioritize big thinking, fresh energy, and decisive action over passive updates. By infusing future-focused strategy, immersive experiences, and action-driven governance, boards can emerge from their retreats more aligned, motivated, and impactful—ready to shape the future of the non-profit healthcare organization with clarity and purpose.

Areas of Focus for Retreat Planning

Reaffirm: Engagement deepens when board members see, feel, and hear the real impact of their work. Yet, too often, work in the boardroom gets reduced to oversight and logistics. Use the retreat to illuminate the vibrant, healing mission of the healthcare organization by spotlighting powerful mission stories and sharing the true human impact of the healthcare mission. Keeping mission at the center is not only a reminder of the power and purpose of the work but also can re-spark board members' emotional connection to the mission.

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Reposition: Nobody wants to sit through more humdrum PowerPoint presentations, so build an experience with dynamic, immersive, and interactive content rather than passive listening sessions. For example, consider:

- TED-style briefings instead of lengthy PowerPoint presentations
- Interactive design thinking sessions or strategy labs
- Small-group think tanks rather than one-way discussions
- Scenario planning or simulations
- Interactive polling

Creating a more engaging, interactive experience will not only boost participation, drive better discussions, and lead to stronger outcomes but will also reposition the board retreat as an exciting “can’t miss” event for the future.

Reimagine: Innovation is the lifeblood of great organizations, and the board retreat provides a platform to explore trends, wrestle with big opportunities, and identify ways to positively disrupt work. Take time within the board retreat to reflect upon big questions, such as:

- What will define a leading healthcare organization in the next 10 years, and how do we ensure we are ahead of that curve?
- How must we leverage AI and predictive analytics to transform patient care and hospital operations?
- What non-traditional partnerships (non-profits, tech, retail, academic, government) could help us expand access, improve outcomes, or reduce costs?

Great governance is not about maintaining the status quo—it should strive to generate bold, creative solutions to meet new challenges and to drive new opportunities—so use the board retreat as an incubator to derive value from innovation, technology, and other forward-thinking tools and work.

Reengineer: Today’s influential and successful volunteers say they are increasingly frustrated with the non-profit board experience. They are weary of “dog and pony” shows and want work that is more consequential, task-oriented, and time-bound. That’s why the board retreat presents a great opportunity to discuss how to not only optimize board impact but also reengineer board service to be more responsive to changing expectations around current volunteer expectations. Consider a working session to:

- Acknowledge how volunteer expectations of board service are evolving.
- Unpack what is unclear, wastes time, creates frustration, or feels low-value.
- Discuss what a high-impact, fulfilling board experience looks like and how it could better leverage individual and collective board member strengths.
- Determine the structure, training, and tools needed to support change.

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By reimagining the board experience to be more time-efficient, action-oriented, and flexible, board service can become more effective, responsive, and personally rewarding for high-performing volunteers.

Redefine: A high-performance board isn't just about collective governance—it's also about leveraging individual influence and action. Board members can offer a variety of significant benefits through their individual engagement as advocates, connectors, fundraisers, and more. Therefore, use the board retreat to also talk about how the organization can leverage the influence, insights, expertise, and networks of board members beyond the boardroom. Consider mapping each board member's unique strengths, engagement preferences, networks, expertise, and similar and then cross-walking these with the organization's strategic needs and opportunities to create pathways to individualized impact.

Reinforce: A high-impact board always keeps an eye on performance—and driving performance is impacted by clear goals, clear roles, and accountability. So, talk about how the organization can create a stronger ecosystem to support role clarity, accountability, transparency, and strategy refinement. Talk about how the board can establish key performance indicators (KPIs) that go beyond hospital financial and operational performance to also home in on board effectiveness and impact.

Recommit: It's always a shame when a board retreat sparks excitement, inspires bold ideas, and creates a sense of momentum—only for that energy to fade once the meeting ends. A retreat should not be a fleeting feel-good event but a catalyst for real, measurable progress. To ensure enthusiasm translates into action, leaders and governance support professionals must design clear post-retreat accountability structures that define objectives, assign ownership, set concrete timelines, and track commitments. Then, continued follow-up can be maintained through regular board meetings. By intentionally building post-retreat follow-through into the board's plans, leaders ensure inspiration leads to impact.

Conclusion

The non-profit healthcare organization's annual board retreat presents a crucial opportunity to reset, align, and inspire board members. Instead of a routine update-driven meeting, a reimagined board retreat should provoke big thinking, unlock fresh energy, and drive aligned action. By integrating immersive experiences and opportunities to genuinely advance the work, the board retreat can become a dynamic, forward-thinking experience to drive deeper engagement, strategic breakthroughs, and renewed commitment.

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Key Takeaways

- Reaffirm the purpose of the board's work through highlighting powerful stories that show the human impact of the organization's mission.
- Reposition retreats to be dynamic and interactive "can't miss" events.
- Build in time to reimagine the status quo. Ask big questions, find creative solutions to challenges, and consider bold, non-traditional organizational opportunities.
- Discuss ways to reengineer the board member experience to be more impactful, time-efficient, and personally fulfilling.
- Redefine the board's role as a connector and advocate. Talk through the individualized impact board members can have through their influence, expertise, and networks outside the boardroom.
- Recommit to ideas and strategies that came out of the retreat. Build post-retreat follow-through into the board's plans with clear timelines, accountability, and commitments.

TGI thanks Betsy Chapin Taylor, FAHP, CEO of Accordant, for contributing this article. She can be reached at betsy@accordanthealth.com.

