



## Reflection as a Board Strategy

By **Keith Wysocki**, Principal Consultant, *Kedros Leadership*

**Ferris Bueller said, “Life moves pretty fast. If you don’t stop and look around once in a while, you could miss it.”**

Health system governance also moves fast. And if you don’t stop and look around, you could miss it as well, with serious consequences for your health system. Boards that don’t reflect on their past are destined to repeat mistakes or fail to institutionalize best practices.

In an era of fast-paced change, jam-packed board meetings, and the need for quick decisions, “reflection as a board strategy” might sound like a luxury—something you might have time for in an idyllic future. But taking time to reflect is not something to save for when times are easier or the board has less on its plate. Reflection should be a priority for boards of all sophistication levels—both when times are good and when they are not.

### Reflection Defined

Let’s first define “reflection as a board strategy.” By “reflection,” I mean engaging in a conscious effort to look back at how the board has functioned—at both a granular level and a high level—and “board strategy” refers to an action the board undertakes with a clear desired outcome or specific purpose in mind.

To recognize the value of reflection, we can turn to an example outside of governance but no less relevant for a healthcare board: quality improvement initiatives. Researchers at Robert Wood Johnson and Virginia Commonwealth University studied the impact of team-based reflection on improving colorectal screening rates in 25 primary care practices.<sup>1</sup> They further identified three types of reflection: organizational reflection, process reflection, and relational

1 Eric Shaw et al., “[How Team-Based Reflection Affects Quality Improvement Implementation: A Qualitative Study](#),” *Quality Management in Health Care*, April–June 2012.

reflection, and they found that *all three* types of reflection had a positive impact on quality improvement implementation:

- Organizational reflection—reflection on the organization’s mission, purpose, and big-picture challenges—led to greater motivation and inspiration.
- Process reflection—reflection on how the team does its work—led to better problem-solving and change management.
- Relational reflection—reflection on relational dynamics in the broader organization—helped them eliminate barriers to collaboration.

Much has been said about remembering the past in order to avoid repeating it. But as this study showed, it was not just remembering that was important. It was remembering the past with the intention of making sense of it and learning from it.

Let’s now return to the boardroom and see how this applies to *governing* a health system.

## **The Risks of Not Reflecting**

Sometimes health system boards suffer because they do not reflect enough on their routine agenda items. When boards engage in a survey-based assessment, board members regularly rate themselves lower on areas such as reviewing the Form 990 or disclosing and addressing possible conflicts of interest. Executives are often quick to provide assurance that the board did what it was supposed to do; board members just don’t remember. At best, what could otherwise be a valuable discussion about a board self-assessment then turns into a reactive reminder from the staff of the routine tasks the board has completed. At worst, when boards do not remember the important things they have done, their perception of their own effectiveness is lower. They feel as though they aren’t performing to their full potential. And this lack of confidence can lead to lower board engagement and contribution.

Even more concerning is when boards fail to reflect on major discussions and strategic decisions. Ironically, boards often do take some time to look back when things “go wrong.” But it is when things are going well—when it is tempting to just move on to what is next—that reflection is most important. Reflection both ensures that good practices become engrained, and that detrimental practices do not turn into major issues. While it can be easy to disregard or gloss over bumps the board ran into on its way toward a major decision, those bumps are rarely isolated or could rear their heads again.

Most boardroom problems are patterns: a domineering board member, an overreliance on management, leaving conflict unresolved, a tendency to act without all the needed information, or a tendency to delay decisions. All of these become reinforced and engrained as the board's modus operandi if they are not specifically addressed.

## **The Benefits of Board Reflection**

Health system boards that take time for reflection, on the other hand, see immense benefits.

The first benefit of reflection is increased self-awareness, which drives improvement. Boards that recognize what they aren't doing well know what to improve, and knowing how to improve helps boards to feel more empowered and feel more self-efficacy.

Have you ever had a third-party observer notice something about the way a group functions that seemed obvious in hindsight but was not apparent while it was happening? Often a group is so close to what they are doing that they do not see all the issues. They "miss the forest for the trees" whereas the third party can see the situation from a "zoomed out" perspective. But you don't always need a third party in order to experience this. Intentional reflection puts the board in the position to pause, zoom out, and look at things from this different perspective.

Secondly, boards that take time to reflect will be more effective in the future because they will have reinforced the board's "neural pathways" in thinking about the work of the board. When you do something once, you are more likely to do it again. Without an outside influence, both good and bad boardroom behaviors repeat themselves. Conscious reflection helps perpetuate the good and take corrective action regarding the bad.

Lastly, reflection improves the board's perception of itself. The board is more likely to recognize and remember the good work it is doing. Board members will feel better about their accomplishments and rate their experience more positively, which can translate into greater engagement on the board, increased philanthropic support, and more confident ambassadorship in the community.

## **The Particular Importance of Reflection for Health System Boards**

Intentional reflection is especially important for health system boards. The more complex the health system—the larger the number of locations, staff, and

affiliated practices and entities—the more the board must make tough decisions about where to spend its time. And continual reflection is vital to ensure that the board is allocating its time appropriately. Health system boards must reflect on if they are balancing time spent focusing on acute care with other aspects of their business and operations. They must reflect on whether they are balancing their time spent on finance with their time spent on quality, community benefit, and other areas of oversight. And they must reflect on complex relational dynamics—not only the relational dynamics within their own board, but also between the board and system leadership, subsidiary boards, and other stakeholders.

## Tools and Tips to Drive Reflection

A culture of reflection is best enabled by using key governance tools and ensuring that all parties know the role they can play. Some key tools include:

- **A “board year-in-review” document** that provides a summary of major accomplishments, decisions, and routine approvals.
- **A board calendar** of key approvals, agenda items, and educational topics. While this is obviously a helpful tool for planning ahead, it is also helpful for looking back.
- **Governance checklists** that take inventory of which recommended documents and practices the board has in place, and which ones it needs.
- **Post-meeting evaluations** that examine how time was spent, how strategic the board was, and relational dynamics during the meeting.
- **Board assessment surveys** evaluating the effectiveness of the board engaging in key behaviors.
- **Meeting time for open-ended reflection**—facilitated by the board chair and primed with questions that board members have had time to think about in advance (e.g., When during the last year were we most effective at considering multiple viewpoints? When were we least effective?).

Here are some specific tips for how a culture of reflection can be instilled by individuals in various roles:

- **Board chairs:** In addition to ensuring the board gets its work done, pay attention to *how* it gets its work done. Begin dialogue about aspects of the board’s decision-making process and relational dynamics that are working well or that could be improved. Ask open-ended questions to get others involved in observing and improving the board’s culture.
- **Board members:** Periodically inventory yourself—the ways you are contributing, interacting with others, and engaging in meetings. Seek feedback about what you should continue, and what you can improve.

And even if you are not the board chair, remember that you have a role in ensuring a strong board culture. Be willing to point out board practices that could be helping or hindering overall board effectiveness.

- **Executives:** Remember that one of the most important things you can control is the information you provide to the board. Offer context about how this information ties in with the mission, strategic plan, and key board responsibilities. Provide context that links the board's current agenda with items it has tackled in the past and will tackle in the future. By showing how the board's work connects, you help the board to "zoom out" more frequently and see the bigger picture.
- **Support staff:** Maintain the documents listed above to help make reflection easier for the board. You play a vital role in helping the board remember what it has done and ensuring a consistent record so that the board is always able to look back and learn from what has happened before.

## Taking the Next Step

Finally, remember that reflection as a board strategy has both tactical and cultural components. A board may start using a "board year-in-review" document, but without a belief among executives and board members in the value of reflection, that document can only accomplish so much.

By dedicating board time and attention to reflecting on how the board does its work, you can help the board build better habits, foster stronger collaboration, and develop confidence in its performance. And while it can be tempting to prioritize other agenda items over reflection, doing so will impose a ceiling on the board's potential. The board will not be able to perform at its best if it is not taking time to look back, learn, and evolve. Instilling a culture of reflection isn't something to do in the future. It's an imperative to do now to get to the next level.

*The Governance Institute thanks Keith Wysocki, Principal Consultant, Kedros Leadership, for contributing this article. He can be reached at [keith@kedrosleadership.com](mailto:keith@kedrosleadership.com).*

