

# Governance Notes

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## Reimagining the Board Retreat: Design for Impact, Not Updates

By Betsy Chapin Taylor, FAHP, CEO, *Accordant*

**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.

### What's Inside:

- Reimagining the Board Retreat: Design for Impact, Not Updates
- Supporting a Healthy Board Culture

To fully harness the power of a reimagined retreat, organizations should prioritize big thinking, fresh energy, and decisive action over passive updates.

**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](mailto:betsy@accordanthealth.com).*

# Supporting a Healthy Board Culture

## Board culture is the most important component and determinant of good governance.

Culture affects every aspect of the board's work.<sup>1</sup> Board culture dictates how meetings play out, the level of discussion that takes place, and ultimately impacts strategic decisions that will affect the hospital or health system—as well as its workforce and patients—now and in the future. Governance support professionals play a critical role in shaping and improving the board's culture. This article highlights best practices governance support professionals can implement to support a healthy board culture.

### Board Culture Defined

TGI defines board culture as the shared values (both behaviors the board professes and behaviors it practices), beliefs, and rules that influence the board's behavior and actions. It applies to both the board as a whole as well as individual board members.

Governance support professionals play a critical role in shaping and improving the board's culture.

### Set Clear Expectations

Board culture issues often stem from members being unclear about their role. Starting with orientation, ensure that each board member understands their responsibilities and what is expected of them during and in between meetings, such as:

- Their fiduciary duties and board responsibilities, including the role of governance versus management. If serving on a subsidiary board, clarify how their role differs from that of the system board to avoid any confusion.
- The importance of coming to meetings prepared. Let board members know when to expect meeting materials and be transparent about needing to review these ahead of time.
- Expectations for meetings, such as attendance, ground rules for behavior, and the value of actively participating and asking questions.
- The need to disclose any conflicts of interest before a meeting.
- Commitments outside the board meeting calendar, such as retreats, conferences, or educational events.

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1 Sean Patrick Murphy and Kathryn Peisert, *Board Culture: An Intentional Governance Guide: Trends, Tips, and Tools*, The Governance Institute, Summer 2016.

Using a “compact” that clearly outlines board member expectations is an especially valuable tool.<sup>2</sup> This compact typically outlines what the organization expects from each director as well as how the organization will support the director in his/her role.<sup>3</sup>

## Encourage Robust Engagement

Governance support professionals can collaborate with the board chair to improve board member engagement. This starts with ensuring that there is robust discussion and debate at every meeting. When board members miss a meeting, they should feel that they have missed out—they missed an opportunity to learn, gain a deeper understanding of an important issue or challenge facing the organization, or take part in a key decision.<sup>4</sup> To encourage engagement:

- **Equip board members with the proper tools.** For example, the board packet needs to have the right level of information so that busy board members have time to review, yet no critical details are left out. It can also be helpful to add framing questions to key agenda items so board members know what will be asked of them and come ready to engage in meaningful discussion.
- **Create an environment where members feel comfortable asking questions and challenging assumptions when necessary.** Again, this starts with setting an expectation from the beginning of membership that respectful, constructive discussions will be the norm. In the current healthcare environment, boards need to be thinking outside the box, evaluating risks, and weighing new strategic options. A boardroom culture that is supportive of these bold conversations is critical.
- **Work with the board chair to actively manage conversations in the boardroom.** A healthy culture occurs when everyone feels like they are contributing and doing their part. The job won't feel meaningful to all if the same board members are always dominating the conversations. To ensure all voices are heard, the board chair should directly invite input from those who haven't spoken. Governance support professionals are often the most in tune with boardroom dynamics and can suggest new techniques (such as breakouts or round-robin discussions) that lead to all voices being heard.
- **Energize meetings.** Prioritize interactive, strategic discussions over long PowerPoint presentations and management updates. When there are presentations, review them ahead of time, make sure they are to the point, and encourage speakers to use interactive dashboards or visuals. Share “mission moments” and real-life patient stories so board members can see the hospital's impact firsthand.

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- 2 For a sample board member job description, view our governance support templates collection at [www.governanceinstitute.com/templates](http://www.governanceinstitute.com/templates).
  - 3 Marian Jennings, “Board Culture: Is Yours a Competitive Advantage?,” *Subsidiary Focus*, The Governance Institute, March 2023.
  - 4 Murphy and Peisert, 2016.

## Build Relationships and Trust

Strong board member relationships can enhance collaboration, trust, and decision making. When board members understand and respect each other, they are more likely to engage in productive discussions, challenge ideas without conflict, and come to consensus about what is the right path forward for the organization.

Governance support professionals can help foster these relationships by scheduling off-site retreats that include team building and time outside board meetings for social activities where board members can get to know each other. Having time to connect in an informal setting may not seem like a “must do,” but as board members become more familiar with each other’s expertise, interests, and personalities, it will positively impact boardroom deliberations.

Governance support professionals can even take it a step further and conduct a “Human Understanding” exercise at a board meeting or a special retreat.<sup>5</sup> This provides an opportunity to learn everyone’s story, such as why they serve on the board, what brings them joy, and their goals when it comes to board service.

## Additional Resources

- [Board Culture](#) (Strategy Toolkit)
- [“Board Culture: Is Yours a Competitive Advantage?”](#) (Subsidiary Focus article)
- [“Effective Governance and Culture Wars: Strategies for Public Hospital Board Members”](#) (Public Focus article)
- [“Governance during an Era of Political and Cultural Polarization”](#) (*BoardRoom Press* article)
- [“Essential Conversations for Effective Governance”](#) (E-Briefings article)
- [Human Understanding in Healthcare Organizations: A Board and Senior Leadership Framework](#) (Strategy Toolkit)

## Assess Board Culture

Rather than assuming there is a healthy board culture, a valuable exercise is for governance support professionals to work with the board chair to conduct a formal assessment of the current board culture. The Governance Institute offers a [sample board culture assessment](#). This will help identify the board’s cultural gaps so that you can help develop a plan for improvement.

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5 For details around conducting a Human Understanding exercise, see [Human Understanding in Healthcare Organizations: A Board and Senior Leadership Framework](#), The Governance Institute, Summer 2023.

While it is easy to push addressing board culture off as a priority, its significance only grows in today's climate of rising expectations, changing regulations and policies, and industry disruptions. A healthy culture will empower the board to be ready for the tough conversations and challenging decisions that lie ahead.

