

Key Strategies for Successful Planning Sessions, Retreats or Advances

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Preparation

1. Know your goals and objectives.
2. The Board needs to feel ownership and that they have a key stake in the results.
3. Plan well, perhaps interview or survey the executive committee or all board members; coordinate with staff. Build advance engagement in the event so they arrive ready to actively participate.
4. Develop documents and other materials needed to support the event.
5. Send the final agenda out in advance – again build engagement in advance.

Event

6. Be clear about all components, materials, advance preparation, dress, location, ability to use cell phones, email, and so forth during the event
7. Begin with an upbeat / optimistic tone. Combine clarity of timing and purpose with flexibility and fun. All need to be a part of the experience.
8. Get the voices in the room early. This is important for board members with an introverted preference so they will feel comfortable participating having “broken the ice”. Even for extroverts if they come in with many other concerns on their mind, this helps get them present in the room.
9. Follow the agenda, have fun, keep the discussion highly interactive while balancing participation.
10. Be clear about final decisions and the responsibilities for follow up.

Afterward

11. Summarize decisions and action steps and distribute to the full board.

Tips add data about board personality preferences and skills

Gain powerful increase in communication and decision making effectiveness and add a fun component by including a personality profile such as Myers Briggs (MBTI) or Emergenetics that will help the Board understand differences in style and decision-making preferences. You can also bring in data on how the board sees itself performing as a team by using the TESI or about their individual skills through using an assessment such as the EQi. This type of information helps board members connect at a deeper level and work with an appreciation for their differences. It is of great value for the CEO and hospital staff working with the board as it provides guidance on how to effectively present information.