PATHWAY TO EXCELLENCE

2026 Leadership & Career Development Program

Session Collection

June 27–28, 2026 • New York, New York

AMERICAN HEALTH LAW ASSOCIATION

Welcome

On behalf of the American Health Law Association, thank you for being part of the inaugural Leadership & Career Development Program. Held June 27–28, 2026, in New York City alongside the AHLA Annual Meeting, this program brought together emerging professionals and experienced leaders for two days of candid conversation about leadership, career growth, and stewardship of our profession.

To everyone who joined us in person: thank you. Your energy, your questions, and your willingness to engage made these sessions what they were. A program built around dialogue only works when the room leans in — and you did.

We owe special thanks to our presenters. Every one of them gave their time, insight, and hard-won experience to this program as a contribution to the profession's leadership pipeline — sharing not just what they know, but the real stories behind how they came to know it. Their generosity is the heart of this collection.

We also want to acknowledge the many AHLA leaders — including our FY26 and FY27 volunteer leaders — who were unable to join us in person this year. We hope this collection serves you well: as a resource for your own leadership journey within AHLA, and as something you can carry into your work environments and communities. The lessons captured here were meant to travel.

The pages that follow gather summaries of the program's sessions, organized into three tracks — Joint Sessions, the Emerging Professionals Track, and the Experienced Leadership Track. Each summary distills the key takeaways, themes, and reflections from the conversation. We hope they prove useful long after the meeting itself.

With gratitude, and with excitement for what comes next,

The AHLA Leadership & Career Development Program Team
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JOINT SESSIONS

Sessions bringing emerging professionals and experienced leaders together in one room.

JOINT SESSIONS

Generational Dynamics & Expectations

Saturday, June 27 · 10:00–10:50 a.m.

Moderator: Mara Smith (Bristol Myers Squibb)
Speakers: Jim Flynn (Bricker Graydon); Halle Diaz (Husch Blackwell LLP)

Today's health law community spans multiple generations, each bringing distinct communication styles, professional values, and workplace expectations. This opening session set the tone for LCDP by bringing emerging professionals and experienced leaders into candid conversation about how generational differences shape collaboration and leadership — and how to turn those differences into strengths. Anchored by three practitioners at different career stages, the discussion moved through bias, hybrid work, relationship-building, and the discipline of knowing when to say yes and when to say no.

Key Takeaways

- **Check your bias at the door — and keep checking it.** Understanding bias, especially implicit bias, is an ongoing discipline rather than a one-time lesson; one panelist likened it to a fitness routine you can never finish. While no one is defined by their generation, understanding the historical and cultural experiences that have shaped a colleague's perspective can provide helpful context. Approaching one another with curiosity rather than assumptions benefits everyone, especially because generational stereotypes can be directed at people of any age.

- **Don't confuse style with commitment.** Because people naturally judge by what's visibly in front of them, remote or non-traditional working styles can be misread as disengagement. A longer commute, a different schedule, or a preference for virtual collaboration says nothing about a person's dedication — it simply means their working style, and what they need from a manager, differs from yours.

- **Every generation is shaped by the tools and realities it grew up in.** The assumption that younger professionals “don't want to work hard” misses a genuine shift in how they work — a preference for flexibility, transparency, and meaningful work over face-time-for-its-own-sake, informed by watching what the old-school grind cost in health and family life. Success is simply being defined differently: logging off to pick up kids or exercise, then logging back on at night to finish strong.

- **Embrace the broadest possible definition of hybrid.** Hybrid isn't only about which days someone is in the office; it's about consciously building and deepening working relationships across in-person and remote settings, each of which demands different, intentional effort. An in-office colleague might be workshopped with spontaneously, while a remote teammate needs a scheduled call — neither is better, but both require you to orient around the whole relationship, not just the work product.

- **Relationships are not an accident.** Durable professional relationships are built through consistent, mutual investment over time — often years, sometimes largely virtual — not stumbled upon. A broad circle of people who genuinely know you can advocate for you in rooms you're not in, help you navigate workplace politics, and endure even after a title or role changes, unlike the transactional relationships that vanish once someone has gotten what they wanted.
- **Listening in 2026 is an active verb.** Amid constant noise from phones, media, and AI, genuine listening takes real intentionality — including interpreting tone across text and email, and resisting the well-documented habit of composing your reply while the other person is still speaking. Creating small, genuine openings for connection — one panelist's well-stocked candy bowl drew senior colleagues into her office for five-minute chats — can matter as much as the listening itself.
- **Adapt without losing yourself.** Building relationships and meeting people where they are shouldn't require sacrificing your authenticity, boundaries, or working style; the goal is to find the approach that's genuinely you. That's especially true under pressure — one panelist stayed transparent and true to his personality while leading a firm through a sudden death, a cybersecurity breach, COVID, and a merger, none of which came with a playbook.
- **Learn when to say yes — and when to say no.** Say yes to opportunities you can get ready for, not only ones you're already ready for; growth lives just past the comfort zone. But protect your capacity and know yourself well enough to step back when something no longer fits — and recognize that colleagues at different career stages carry very different priorities and bandwidth, so what looks like reluctance may simply be a different season.
- **Assume good intent.** In a contentious, low-phone-call era where so much communication is compressed into text, extending good faith across generational and communication differences goes further than reading between the lines for laziness or resistance. Starting from the premise that the other person wants the right thing tends to end, nine times out of ten, in a new advocate or friend.

Themes in Brief

- ***Bias & perception.*** Generational stereotypes cut in every direction; naming and interrogating them is continuous work.
- ***The changed nature of work.*** The COVID-19 pandemic and the rapid advancement of AI have fundamentally changed where and how health law is practiced, while redefining expectations for the profession.
- ***Relationship capital.*** Intentional, non-transactional relationships are the through-line of a fulfilling career and the reason many practitioners find their way to (and stay with) AHLA.

Reflection

Framed as a “fireside chat” across three career stages, this session modeled the very cross-generational exchange it advocated. Its lasting message: generational friction usually dissolves when leaders trade assumptions for curiosity — meeting colleagues where they are, investing in relationships deliberately, and staying authentic while remaining open to how the profession is changing.

JOINT SESSIONS

Conflict Resolution

Saturday, June 27 · 2:15–3:05 p.m.

Speakers: Kim Harvey Looney (Epstein Becker & Green PC — participated virtually); Kathy Roe (Health Law Consultancy)

Navigating conflict is an essential leadership skill, whether tension arises within a team, across an organization, or between external stakeholders. This interactive session reframed conflict not as something to avoid but as something to move toward — a potential source of innovation, stronger relationships, and better decisions. Anchored by a working definition of conflict and a five-step resolution process, and brought to life through real-world hypotheticals worked through with the audience, the session gave participants a practical framework for engaging disagreement constructively.

Key Takeaways

- **Running from conflict gives it power over you.** As the session's opening frame put it, the more we avoid conflict, the more it controls us — and the less we fear it, the less it confuses us. The invitation isn't to seek conflict out as a goal, but to stop fleeing it and instead treat it as something you might grow from, both as a health law professional and as a leader.
- **Conflict has two faces.** The same underlying incompatibility that feels adversarial — two parties dug in, drawing lines in the sand — can also be productive, surfacing diverse viewpoints, forcing creativity and innovation, and producing agreement that, even when it isn't a happy agreement, still creates a workable path forward.
- **Conflict requires incompatibility plus interdependence.** By the working definition the session built, you need a real or perceived difference between two or more parties who have some reason to interact; absent that interdependence, differences simply coexist without friction. Crucially, much of the “difference” lives in our heads — the reality we construct internally can feel more real than what's actually happening, and it shapes how we respond.
- **Unhealthy responses share a pattern.** Taking a disagreement personally, treating it as an attack rather than constructive criticism, reacting to a conflict you've only imagined, drawing a line in the sand, or retreating into silence all escalate rather than resolve — and most trace back to the story playing in your own head rather than the facts on the ground.
- **Take a beat.** Stepping back does double duty: it lets everyone's temperature cool, and it creates space to separate the real facts from the narrative you've constructed, so you re-engage clear about your own position and genuinely curious about the other side. In the heat of the moment curiosity is hard — irritation crowds it out — which is exactly why the deliberate pause matters.

- **Work the process.** Resolution is a repeatable sequence, not a personality trait: identify the true incompatibility, understand and acknowledge the other side (a show of respect in itself), seek “compatible ground” rather than necessarily common ground, generate a range of possible solutions, then land on the one workable outcome both parties can live with. You won't hit every step in every conflict, but you have to at least understand what's really at issue before you can resolve it.
- **Listen for understanding, not agreement.** Don't assume you already know what the issue is for the other person — reflect it back and confirm it (“this is what I'm hearing you say; is that right?”). You may discover you're far closer to, or farther from, resolution than you assumed, and either way you've shown the other person their perspective is worth your time.
- **Name the shared goal.** Simply asking “what problem are we actually trying to solve?” begins to dissolve conflict, because it reframes adversaries as collaborators working toward a common aim. Underneath differing vantage points there is usually something shared — the patient, the community, the organization — and articulating it out loud puts everyone back on the same page before the details get negotiated.

Themes in Brief

- ***Perception vs. reality.*** Much conflict is driven by the reality we construct internally; testing that against the facts is the first move.
- ***Process over instinct.*** Resolution is a repeatable sequence, not a personality trait — and worth practicing.
- ***Interdependence.*** Because organizations are made of interdependent parts, resolving friction is what lets each part meet its objective.

Reflection

By opening with a provocative premise — that avoidance, not engagement, is the real danger — this session recast conflict as an unavoidable and even generative feature of leadership. Its practical through-line: slow down, separate fact from story, seek to understand before persuading, and anchor every disagreement in the problem you're jointly trying to solve.

JOINT SESSIONS

Leadership, Ethics, and Governance Foresight: Real-Life Scenarios

Sunday, June 28 · 10:00–10:50 a.m.

Speakers: Jim Flynn (Bricker Graydon); Chris Carnahan (VMG Health); Kim Harvey Looney (Epstein Becker & Green PC — participated virtually)

The most consequential leadership decisions rarely come with clear answers — they arise in gray areas, under pressure, and at the intersection of competing obligations. This culminating session drew on three very different career journeys to work through the real dilemmas leaders face: eroding guardrails, decision-making under crisis, choosing the right leaders, picking partners, and knowing when — and how — to say no.

Key Takeaways

- **"No" is a powerful and necessary word.** If everything you say is a yes, you're not doing your job — and you have no credibility when it counts. The skill is saying no thoughtfully: as an engaged participant who has looked at the issue from all angles, not as the reflexive "office of no." That willingness to pause or stop is often the only safeguard against a decision the organization will regret.
- **Speed is eroding guardrails.** In a culture that prizes doing everything faster, longstanding stopping points — real diligence, conflict-of-interest handling — increasingly get bypassed, and a short-horizon, private-equity mindset ("own it five to seven years, then move on") is spreading into how many leaders approach decisions and even personal choices. The panel was candid that this isn't simply right or wrong, but that the equilibrium between speed and caution has tilted out of balance.
- **Use a "headline test" as a momentum check.** Momentum is a powerful force: once everyone else is moving, the pull to override a lingering concern only builds, so raising your hand early matters. A quick gut-check when momentum is carrying a decision is to ask how it would look as a news headline or a social media post — and whether you'd be comfortable if it surfaced.
- **Lead like the calm duck.** In crises with no playbook — a sudden death, a breach, a pandemic — people read both verbal and non-verbal cues from their leader. The lesson from hard experience: get out in front with what you do know rather than waiting until you know everything, stay honest about genuine risks rather than sugarcoating them, and project steadiness on the surface even while you're paddling furiously underneath, because your people need to believe you when you say it will be okay.

- **Principles travel better than policies.** A culture built on shared agreements and stories — communicate directly but respectfully, have each other's back, show up the next day — can guide behavior more durably than a thick rulebook, and tends to hold up better under pressure. Some organizations genuinely need formal policies, but leading from a clear, authentic set of principles is what actually shapes an ethos.
- **Beware the Peter Principle.** Organizations routinely promote their best practitioner — the top litigator, the strongest rainmaker — into a leadership role one layer beyond where their strengths lie, and it's far easier to prevent than to undo. Better alternatives keep talent where it does its best work: pairing a strong practitioner with a co-leader, and aligning incentive systems so people are rewarded for their “unique ability” rather than pushed into management just because that's where the money or status sits.
- **Pick your partners — and your safe spaces — wisely.** You cannot build a system strong enough to fix a partner who is fundamentally dishonest, so alignment on integrity has to come first, even when walking away is costly. Just as important is cultivating a confidential “safe space” — a network of trusted peers, often outside your own organization and ideally a step ahead of you — where you can test hard leadership and ethics questions and get objective counsel you can't always find inside your own walls.
- **When the problem is your supervisor, find a safe space and take the long view.** For those earlier in their careers, the hardest version of an ethics problem is when the person exhibiting questionable judgment is the one you report to. The path forward: seek a trusted mentor or peer (framing it as “what would you do if…”), use anonymous ethics or compliance channels where they exist, and remember that the long view almost always favors doing something over hoping someone else handles it — you're rarely the only one who has noticed.

Themes in Brief

- ***The changing tempo of practice.*** Faster deals, looser norms, and the accelerating impact of AI are reshaping the ethical landscape — with the panel split on whether this is the “new normal” or a swing that will correct.
- ***Authentic leadership under pressure.*** Steadiness, transparency, and self-awareness (knowing what you're not good at) define effective crisis leadership.
- ***Relationships as infrastructure.*** From crisis-response partners to peer “safe spaces,” durable, non-transactional relationships are what leaders lean on when there's no playbook.

Reflection

Structured as a candid conversation across three career arcs, this session delivered on its billing as the program's culminating experience — pulling governance, ethics, conflict, and strategic judgment into the messy reality of decisions made under pressure. Its enduring lesson: leadership integrity is exercised in the willingness to slow down, say no, stay authentic, and build the relationships that make hard calls survivable.

Career Pathways: Non-Linear & Non-Traditional

Sunday, June 28 · 11:00 a.m.–12:30 p.m.

Speakers: Andrea Ferrari (Hancock Daniel); Jody Joiner (Sound Physicians); Melissa Myers (Cleveland Clinic)

Health law careers rarely follow a straight line, and the most fulfilling paths often include unexpected pivots, role changes, and hard-won lessons. Framed around the idea that “careers are a jungle gym, not a ladder,” this session paired data on how the profession is changing with three candid personal narratives — spanning firm, in-house, government, consulting, and legal-adjacent roles — and what each speaker wished they'd known sooner.

Key Takeaways

- **Careers are a jungle gym, not a ladder.** Borrowing Sheryl Sandberg's framing, the session made the case that advancement isn't only upward — lateral moves, detours, and unexpected rungs often build the broadest and most valuable base of experience. Even the metaphors resist tidiness: as the panel noted, there's no single kind of jungle gym or even a single kind of ladder, which is rather the point.
- **The profession itself is evolving.** Solo practice straight out of law school has dropped sharply over the past four decades, while placement at large firms (now defined as 251+ attorneys) has grown. Meanwhile, highly specialized fields like health law have generated a whole ecosystem of legal-adjacent roles — the alternative legal services market is now a multibillion-dollar sector — reshaping what a “traditional” path even looks like.
- **Many lawyers don't aspire to the traditional track.** In a 2019 NALP survey of nearly 2,500 lawyers, most associates (59%) did not aspire to make partner at their current firm; of those, about a fifth wanted to move in-house and roughly a third didn't know where they'd be in ten years. A striking 84% of those not aiming for partner said they'd take a lower-paying job for fewer hours. Non-linear and non-traditional paths are becoming the norm rather than the exception.
- **Say yes to happenstance.** Careers often turn on genuinely accidental opportunities — an ad answered, a chance conversation at a job fair, a single case that makes you an unexpected expert. Being open to “what the heck, I'll try it” rather than tunnel-visioned on a predetermined plan is repeatedly what opens the doors that matter, and passing them up to protect a fixed idea of your path can cost you the best turns.
- **Be a “compound professional.”** Every divergent experience — a teaching side gig, a secondment, a volunteer board seat, a stint in an adjacent field like valuation or consulting — compounds into a distinctive skill base and network that a straight climb simply can't replicate. That accumulated range is what lets you issue-spot, know whom to call, and answer the questions your clients actually have.

- **The line only appears in hindsight.** In the moment, a career can feel like a scatter plot of unrelated dots; the connecting line emerges only when you look back. Trusting that varied, seemingly unrelated experiences are quietly building toward something makes it easier to take the next step even when it isn't obviously "up."
- **Network to give, not to get.** The point of networking is the relationship itself — offering help and showing up consistently — not collecting business cards or reaching out only when you need something. Value tends to flow back over time, but that return is a byproduct; the goal is to give something to the other person first.
- **A law degree enables far more than practicing law.** Against the common advice not to attend law school unless you want to practice, the session offered a strong counterpoint: a meaningful, high-impact career can be built in policy, strategy, valuation, or advisory roles that fully leverage legal training — persuasive writing, analysis, advocacy — without a conventional lawyer's title.
- **Prepare, pivot, progress.** When things don't go as planned, a pivot doesn't have to be perfect — it just has to move you forward. Preparation is what lets you seize an opportunity the moment it appears, and looking back, the combination of being ready, pivoting when needed, and insisting on progress is usually what carried a career closer to where it was meant to go, even if that destination was never the one originally imagined.

Themes in Brief

- ***A changing profession.*** Data on solo practice, big-law growth, the advancement of women in the profession, and the rise of legal-adjacent roles set the context for why non-linear paths are increasingly common.
- ***Serendipity, harnessed.*** The recurring motif — speakers and participants with pre-med beginnings, accidental specialties, unplanned pivots — is that openness plus preparation turns chance into opportunity.
- ***Relationships and self-knowledge.*** Networking as generosity, and knowing your "passion, people, and power," anchor durable career growth.

Reflection

By combining hard placement data with three refreshingly honest "how I actually got here" stories, this session normalized the reality that few health law careers are planned in a straight line. Its lasting encouragement: invest broadly, stay open to the unexpected, network out of genuine generosity — and trust that the seemingly scattered dots will connect.

> *"Careers are a jungle gym, not a ladder — the connecting line only appears when you look back."*
> **— From the Career Pathways session**

EMERGING PROFESSIONALS TRACK

Sessions focused on career insight, professional skill development, and leadership exposure for early-career professionals.

EMERGING PROFESSIONALS TRACK

Strategic (and Organic) Networking

Saturday, June 27 · 11:00–11:50 a.m.

Speakers: Avery Schumacher (Epstein Becker & Green PC); Mara Smith (Bristol Myers Squibb)

Networking is often misunderstood as a transactional exercise, but the most durable professional relationships develop naturally over time through shared work, genuine curiosity, and consistent presence. Told from two vantage points — outside counsel and in-house — this session reframed networking as a career-long practice rather than an event, and worked through three concentric “circles of connection”: within the workplace, within AHLA, and out in the wider field.

Key Takeaways

- **Networking is relationship-building, not a transaction.** The most durable relationships aren't manufactured at a single event; they develop through consistent, low-key touches over time. Everyone recognizes the person who only calls when they need a favor — and treating a professional network that way lands just as poorly as asking someone to help you move after years of silence.
- **Durable relationships grow through shared work.** Being “in the battlefield together” — co-authoring an article, serving together on a council, collaborating on a novel problem — creates a foundation that's far easier to build on than a cold introduction. In a fast-changing field, that shared work also lets you call a peer to ask “have you seen this yet?” and, over time, helps shape the developing law itself.
- **Lead with genuine curiosity.** Take an authentic interest in people as people, not as opportunities — and the opportunities tend to follow. The counter-example landed hard: a law student who ended a speed-networking conversation with “I've gotten about all I can get out of this,” making explicit the transactional posture most people sense even when it's unspoken.
- **Both people have to be invested — and that's information.** Networking has a reciprocity you can feel; when someone consistently meets you halfway, that signals genuine investment, and when they don't, that's worth noticing too. You may often be the one reaching out, but you'll sense who's engaged with you in return.
- **Meet people where they are.** Everyone connects differently — one mentor relationship might mean a long, leisurely dinner, another a precise 45-minute video call. Forcing your preferred mode on someone who wants a different one only creates friction; adapt to the other person's style rather than your own.
- **The handwritten note is a low-cost superpower.** Especially for the emerging generation, a handwritten thank-you note stands out precisely because so little intentional, personalized mail arrives anymore. It costs almost nothing, sets you apart from your peers, and — when it's genuine to you — opens doors and starts relationships that carry on by email for years.

- **Be genuinely, specifically you.** Sharing an authentic personal detail — a favorite band seen many times over, a habit of sending baby books or a small treat to mark good news — is what turns contacts into real relationships. But only adopt the gestures that are true to you; a forced version reads as hollow.
- **Inside the workplace, your internal network is the foundation.** None of the other circles matter as much without it. Deliberately spending in-office time on 30-minute coffees — with people you don't yet know as much as with established contacts, and not limited to lawyers — builds a broad base of advocates, makes you “more human” than the resident “office of no,” and surfaces intel (which teams are shrinking, whom to avoid) you'll never find in a job description.
- **AHLA is a network at your fingertips — and you get out what you put in.** The organization can grow with you across a whole career: it provides platforms to write and speak that build external credibility (which reflects well back home), practice-group and council roles that lead to one another, and a room full of like-minded people who actually want to spend a weekend talking health law. Those relationships spill into the real world in unexpected, career-making ways.

Themes in Brief

- ***Networking as practice, not transaction.*** The through-line — genuine, consistent, reciprocal relationship-building beats event-driven card-collecting every time.
- ***Three circles of connection.*** Workplace, AHLA, and the wider field each work differently, but reinforce one another.
- ***Authenticity as strategy.*** Being specifically and genuinely yourself is what makes relationships real and memorable.

Reflection

By pairing an outside-counsel and an in-house perspective, this session showed that the fundamentals of networking hold across very different career paths: invest consistently, lead with curiosity, meet people where they are, and let the relationship — not the ask — be the point. Its most practical encouragement for emerging professionals was that small, genuine gestures and steady presence compound, over a career, into a network that is both a source of meaning and, eventually, of opportunity.

EMERGING PROFESSIONALS TRACK

Proposals, Presentations, and Speaking Skills

Saturday, June 27 · Noon–12:50 p.m.

Speakers: Marc Goldstone (Wellpath); Julia Michael (K Health)

The ability to communicate persuasively — whether drafting a conference proposal, presenting to leadership, or facilitating a room — is one of the most transferable skills a health law professional can develop. This hands-on session lifted the curtain on how AHLA's speaker-selection process actually works and walked through the full arc from proposal to delivery: picking a topic, titling it, building the panel and the deck, and speaking (not just talking) once you're on stage.

Key Takeaways

- **Understand how the "sausage" gets made.** Speaking slots aren't a friends-of-friends mystery: an electronic call for speakers goes out, and volunteer planning committees weigh 50–150 proposals for perhaps 30 slots, some of which are duplicates. Knowing the process — and knowing that a rejection isn't final — lets you propose smarter and try again.
- **Speaking is a two-way gift.** Contributing to AHLA as a speaker and advancing your own career through visibility are both legitimate, non-exclusive motives — and whatever you give the organization tends to come back "better than the stock market." There's also a private benefit: preparing to present forces you to learn the substance more deeply than you otherwise would.
- **Pick a topic you can credibly own — and don't wait for "enough" experience.** Committees weigh the topic against the presenter's demonstrated expertise, so a proposal to become an expert "in 12 weeks" won't fly. But emerging professionals genuinely know some things (AI, newly changed areas of law) better than many veterans; a shifting legal landscape creates openings to become the credible voice, so don't assume you need three more years.
- **The title can make or break you.** With committees facing dozens of near-identical submissions, a boring title ("AI and Healthcare: What You Need to Know") gets lost and a too-clever one ("Stethoscopes, Algorithms, and the Gray Zone") fails because no one can tell what it's about. The winner sets up a real problem the session will solve ("When AI Is Wrong: How Health Systems Are Managing Liability"). Be true to yourself, but don't be afraid to give your title a little edge.
- **Justify the panel, and build it for diversity.** Don't propose a moderated panel a topic doesn't need, or five speakers when three is the norm; explain why multiple viewpoints (experience level, in-house vs. firm, government, sector) serve the content. And design deliberately for a range of perspectives and experiences. Doing so strengthens the discussion, better reflects the audiences we serve, and creates opportunities to bring forward new voices.

- **Chemistry can matter more than credentials.** A panel where co-presenters genuinely riff off each other engages a room in a way expertise alone can't. The gold standard is a pairing so good the audience “would watch them read the phone book” — but that never happens on a first outing, so it's something to build toward.
- **Introduce yourself with relevance, not a résumé.** A 30-line, 28-bullet bio loses the room before you reach the substance. Four crisp sentences that answer “why am I credible to tell you this?” — the “why am I here,” not the whole career history — is the goal.
- **Substance first; the deck is the cherry on top.** Keep roughly 40–50 words maximum per slide (nothing smaller than 24-point type) so the audience listens instead of squinting. A slide deck should bolster the talk, not replace it; a deck packed with everything is just a downloadable white paper and removes any reason to attend. Aim for the right balance: enough on each slide that someone who comes across it later thinks, “That's exactly what I needed — I wish I'd been there.”
- **Use AI as your marketing department — but know the tool and make it self-critique.** In 2026 there's no excuse for a fractured, inconsistent deck: a well-trained AI assistant can produce polished, on-brand slides. Two cautions: know each tool's limits (one refused a task another handled instantly), and always ask the AI to critique its own output “like a blunt editor,” since these tools default to flattering you.
- **Prepare together, then speak — don't just talk.** Rehearse out loud with your co-presenter so you're not colliding or leaving awkward gaps on stage. Assign one person as the timekeeper (and agree on a discreet “safe word” to rein in a runaway speaker), because the worst committee reviews come from sessions that ran over, skipped slides, or left no time for questions. And genuinely engage — eye contact, moving into the room, authentic personal detail — because that's what makes the substance stick.

Themes in Brief

- ***Demystifying the process.*** Understanding how proposals are evaluated turns speaking from a mystery into a learnable skill.
- ***Substance over polish — with AI as an equalizer.*** The content and the speaker carry the session; modern tools remove the old excuses for a weak deck.
- ***Authenticity and engagement.*** Chemistry, genuine personal detail, and speaking-with rather than talking-at are what audiences remember and reward.

Reflection

Delivered as a lively, this session gave emerging professionals both the insider mechanics of getting selected and the craft of delivering once chosen. Its recurring encouragement: you likely already know enough to contribute, the process rewards preparation and authenticity far more than seniority, and every genuine, well-rehearsed appearance builds the credibility that leads to the next one.

> *“The most expensive words in any organization may be, “this is the way we've always done it.””*
>
> **— From the Strategic Planning session**

EMERGING PROFESSIONALS TRACK

Leading Volunteers Effectively

Saturday, June 27 · 3:15–4:05 p.m.

Speakers: Karen Palmersheim (Cigna); Adam Greene (Davis Wright Tremaine)

Leading volunteers requires a fundamentally different skill set than managing staff — success depends on influence, motivation, and shared purpose rather than formal authority. Drawing on deep volunteer-leadership experience (from AHLA practice groups to two decades with the Pasadena Tournament of Roses), this session covered why volunteer leadership is different, what keeps volunteers engaged, and how to run the first 30 days, assignments, and meetings — closing with interactive scenarios.

Key Takeaways

- **Leading volunteers is not like delegating to staff.** The usual levers — evaluations, future work, a paycheck — are gone. Volunteers aren't paid, may not share your goals, may have been “voluntold,” and have limited reason to comply, so leading them is “more like herding cats” and depends on influence rather than authority.
- **Disengagement is the central risk — so make it worth their while.** It's easy for volunteers to coast (“someone more interested will do it”) or show up only for résumé value. A happy volunteer is a productive one who comes back, so the leader's job is to make the work feel important, appreciated, and genuinely enjoyable.
- **Learn what motivates each person, then feed it.** Motivations vary — growth, résumé value, leadership experience, making partner, a sense of contribution. The more you can identify what drives a particular volunteer (especially those taking on responsibility within your group) and match them to it, the more engaged they'll be.
- **The best volunteer leaders lead by example and stay humble.** You likely landed the role through natural progression, not a leadership class no one ever took — so borrow what's worked for others while staying true to yourself. Humility matters: the chair who bends down to pick up trash before the guests arrive, or does the “silly job,” earns the trust and followership that titles alone don't.
- **Nail the first 30 days.** Open with a warm welcome, share a roster, and reach out one-on-one to key members and returning volunteers to learn how things have been done — which both teaches you the ropes and signals respect. Those early investments in people pay off for years.
- **Gratitude, food, and fun are not extras — they're the work.** Thank people constantly and publicly, and deflect credit to the group. Feeding people (even a simple no-budget spread) signals you're going out of your way for them. And “make it fun” is close to the whole job of volunteer retention — when people enjoy it, they thank you for the chance to help.

- **Match assignments to interests, be crystal-clear on scope, then let go.** Don't hand the same person the thankless task outside their interest area; align work with what people care about. Spell out expectations (a two-paragraph blog vs. a five-page think piece) — but once it's assigned, resist imposing your own vision, which gets harder as your own expertise grows.
- **Beat the "somebody else's problem" effect.** Counterintuitively, the larger the volunteer list you email, the less likely anyone responds, because responsibility diffuses. A live "who'll take this?" on a small call almost always yields a volunteer; a broad blast rarely does. Make the ask specific and personal ("I could really use your help on X"), and surveys that gauge interest and availability help match people to work they actually want.
- **Run meetings that respect people's time — and don't micromanage.** Circulate an agenda and materials in advance (and remind people of attachments), expect pre-reads rather than reading aloud in the meeting, vary participation to draw in quieter members, end on time, and follow up with decisions and next steps. Give volunteers the tools that make their job easier (last year's budget, a sample letter) — that's support, not micromanagement — but avoid controlling behaviors like demanding to be copied on every email, which read as distrust even when well-intended.
- **When a volunteer stalls, protect the relationship while protecting the work.** A direct, kind "Southern-charm" conversation — "what's your workload like; would it help if I reassigned this?" — forces accountability without burning the person, because volunteers are a resource you want to keep, not lose. Set expectations early if they volunteer again, consider a co-lead structure (a clear captain and assistant captain) so responsibility stays unambiguous, and be flexible enough to keep good people in the fold even when a given task doesn't work out.

Themes in Brief

- ***Influence over authority.*** Every tool of volunteer leadership substitutes motivation, gratitude, and fun for the leverage a manager would have.
- ***Engagement by design.*** From the first 30 days to specific asks to fun meetings, keeping volunteers requires deliberate, ongoing effort.
- ***Keep the person, not just the task.*** Even underperformance is handled with an eye to retaining a scarce, valuable volunteer for the long term.

Reflection

Grounded in vivid real-world volunteering — roses handed out on Pasadena street corners, lost-and-found wristbands, a chair stooping for trash in a suit — this session translated a lifetime of volunteer leadership into practical habits emerging professionals can use immediately. Its central insight: because volunteers give their time freely, leading them well is an exercise in gratitude, clarity, and genuine care, and doing it well is exactly how you build the reputation that carries your own leadership career forward.

EMERGING PROFESSIONALS TRACK

Fundamentals of Governance

Saturday, June 27 · 4:15–5:05 p.m.

Speakers: Rob Gerberry (University of Notre Dame Law School); Brian White (Wake Forest University)

This session's audio was not captured due to a technical issue; the summary below is drawn from the presenters' slide materials.

Whether serving on a committee, a practice group leadership team, or an organizational board, understanding how governance works is foundational to effective leadership. This session demystified the structures, responsibilities, and decision-making processes that define organizational governance — from the board's core functions and fiduciary duties to recruitment, orientation, operations, education, and committee oversight — giving emerging professionals the context to participate meaningfully and lead with confidence.

Key Takeaways

- **Governance is the system by which an organization is directed and controlled.** At its core it encompasses strategic oversight, leadership oversight, internal controls and compliance monitoring, and risk governance — the framework within which a board sets direction and holds management accountable.
- **Governance and management are distinct — and the line matters.** The board sets direction and policy, oversees performance, approves major strategic decisions, monitors risk, and hires and evaluates the CEO; management implements that strategy, runs operations, and leads the workforce. Directors are expected to stay in the governance domain and not drift into managing.
- **Three fiduciary duties anchor board service.** The duties of care (attend, prepare, ask questions, exercise oversight), loyalty (put the organization's interests ahead of personal gain, manage conflicts of interest), and obedience (comply with governing documents and the law) define what every director owes the organization.
- **Familiar duties are taking on new twists.** Recent matters sharpen the stakes: the Caremark and McDonald's line of Delaware cases ties potential liability to failing to build information-reporting systems or consciously ignoring red flags, while the Silicon Valley Bank and Signature Bank failures were framed by regulators as breakdowns in board and management risk oversight and corporate governance.
- **Effective boards are harder to build than they look.** Benchmark data cited in the session found fewer than half of boards rate as effective, and it's genuinely difficult to assemble directors who combine the right knowledge, experience, and diversity and who work well together — making deliberate recruitment and composition essential.

- **Recruit for competencies and diversity; orient for success.** Strong boards are built by mapping needed skill sets (clinical, finance, governance, legal, IT, strategic planning, and more) and recruiting for diversity of background, geography, and perspective while weighing the real time commitment of unpaid service. New directors should be oriented on structure, fiduciary duties, finances, compliance, and conflicts of interest so they can contribute from the start.
- **Boards run on good information and good operations.** Directors need sufficient, high-quality, timely information to do their jobs — long, last-minute pre-reads undermine effective discussion. Well-run boards use clear agendas balancing business items with strategic topics, an annual work plan, capable management support, and the right staff in the room.
- **Board education should be continuous.** Beyond onboarding, effective boards build in recurring refreshers (fiduciary duties, conflicts of interest, financial statements, compliance, self-assessment) and episodic sessions on emerging issues (AI, health equity, the latest regulatory guidance, relevant case studies) to keep lay directors current.
- **Committees and conflict-of-interest practice carry much of the load.** Standing committees (executive, audit, compensation, finance, governance/nominations, quality, and others) structure the board's oversight, and conflict-of-interest management has to go beyond a written policy to real procedures — disclosures, review, board acceptance, and ongoing education, with attention to the “less obvious” situations.

Themes in Brief

- ***The governance/management boundary.*** Much of good board service is understanding where oversight ends and management begins.
- ***Duties in a higher-stakes era.*** Care, loyalty, and obedience remain the anchors, but recent cases and bank failures have raised the bar on oversight and documentation.
- ***Boards as built things.*** Effectiveness comes from deliberate recruitment, orientation, information, education, and committee structure — not from good intentions.

Reflection

This session offered emerging professionals a clear map of a subject many encounter only once they're already on a committee or board. Its foundational message: governance is a discipline with defined duties, boundaries, and structures, and understanding that framework early — including how recent cases have sharpened directors' oversight obligations — equips rising leaders to step into board and committee roles with genuine confidence.

EXPERIENCED LEADERSHIP TRACK

Sessions focused on advanced leadership, governance, influence, and organizational stewardship for established professionals and volunteer leaders.

EXPERIENCED LEADERSHIP TRACK

Mentoring, Sponsorship, and Championing Emerging Professionals

Saturday, June 27 · 11:00–11:50 a.m.

Speakers: Michael Schaff (Wilentz Goldman & Spitzer); Lisa Vandecavaye (formerly with The Joint Commission); Elisabeth Belmont (Maine Health)

Mentorship is well established in health law, but sponsorship and active championing of emerging professionals remain underutilized levers for building a stronger pipeline. This session distinguished four overlapping ways experienced leaders develop others — mentoring, sponsorship, coaching, and championing — and made the case, through candid personal stories, that experienced leaders strengthen the whole community when they use their influence and access to create real opportunities for those earlier in their careers.

Key Takeaways

- **Mentorship doesn't require a single formal relationship.** The classic model — a structured pairing with set goals and a meeting schedule — is only one path. A powerful alternative is to treat mentoring as continuous learning drawn from many colleagues at different career stages and subspecialties, engaging peers, interdisciplinary teams, and even those junior to you, since everyone has something to teach.
- **Stretch into opportunities before you feel ready.** A recurring story: an early-career lawyer nearly turned down the chance to co-present with a far more experienced attorney out of self-doubt, only to be told the session was already submitted. It went well — and the more senior partner said she'd learned as much from the junior lawyer's in-house perspective as the reverse. You never know when a development opportunity will arise, so take it even when it feels like a stretch.
- **Sponsorship opens the door a mentor only points to.** The clearest distinction the session drew: a mentor guides you to the door; a sponsor opens it and lets you walk through. Sponsorship means actively using your influence, network, and resources to accelerate someone's trajectory — advocating for them on a client matter, or vouching for them in a partnership decision, precisely in the rooms they cannot enter themselves.
- **Pay it forward by unlocking opportunities and making introductions.** Before the vocabulary of “sponsorship” existed, it was simply “pay it forward.” In practice that means recruiting newer people to write a chapter, co-present, or join a project — and, just as importantly, personally introducing them into your network over dinner or drinks so they feel comfortable enough to get and stay involved.

- **Coaching is the newer, collaborative layer — and it requires trust first.** Unlike directive training, coaching relies on inquiry, reflection, and accountability to build critical thinking and executive presence, and it lets a leader share candid feedback an individual might never otherwise hear. But it only works on a foundation of trust and psychological safety; introduced without that foundation, it reads as a threat, and the relationship can be lost before it begins.
- **Focus on people's strengths, not just their gaps.** A team exercise built around a strengths-assessment tool revealed how much you learn about colleagues by naming what they each do well — and made visible where a team's collective gaps lie (for instance, discovering only one person on a legal team had the trait of natural persuasion and enthusiasm). Building on strengths, and tying development to department goals, is more energizing than a deficit-focused approach.
- **Reframe imposter syndrome as belonging.** Emerging professionals repeatedly voice imposter syndrome; the antidote offered was simple and direct — you're in the room, which means you belong in the room, and you were asked because you have something valuable to offer. Flipping that narrative, while encouraging them to listen and absorb, helps them build their own networks with confidence.
- **These roles give back as much as they take — and build lasting community.** Being a mentor, sponsor, or coach is real work, but the return is at least as great: lifelong friendships, a sense of community, reduced burnout, and the deep satisfaction of watching people you invested in rise. AHLA itself functions as a kind of sponsor — an open door where a call placed “member to member” is almost always taken.
- **Don't wait to be asked, and help others do the same.** A standing “assignment” to leaders: seek out newer members, ask what they're interested in, and make concrete suggestions for getting involved (even something as simple as contributing a short column they can proudly share with family). Championing, coaching, sponsoring, and mentoring can happen almost invisibly, and the whole organization is stronger for it.

Themes in Brief

- ***A continuum, not four separate boxes.*** Mentoring, sponsorship, coaching, and championing overlap and can happen at once; what unites them is investing in another person's growth.
- ***Reciprocity and pay-it-forward.*** Nearly every leader on the panel traced their own career to someone who opened a door — and framed developing others as repaying that debt forward.
- ***Community as the payoff.*** The relationships, friendships, and sense of “coming home” that AHLA fosters are both the reward for this work and the reason it matters.

Reflection

Told largely through the panelists' own origin stories — a cold favor that led to a first speaking slot, a colleague who pulled someone onto a committee, a coaching relationship that faltered for lack of trust — this session made an abstract topic concrete and personal. Its enduring message: experienced leaders hold doors that emerging professionals cannot open for themselves, and choosing to open them, generously and often, is how a profession renews itself.

> *“You get out of AHLA what you put into AHLA — and, at the end of your career, you'll say you got more from it than you gave.”*
> **— From the Mentoring, Sponsorship & Championing session**

EXPERIENCED LEADERSHIP TRACK

Styles and Traits of Successful Leaders

Saturday, June 27 · Noon–12:50 p.m.

Moderator: Michelle Tidjani-Johnson (CommonSpirit Health)
Speakers: Terri Meldrum (VNS Health); Earl Barnes (Sentara Health)

Effective leadership looks different across contexts — and the most successful leaders understand their own style while remaining adaptable to their teams and organizations. In a candid, transparent conversation among three senior legal-and-business leaders, this session traced the evolution from technician to leader and explored influence, authenticity, isolation at the top, protecting a team through turbulence, the value of outside board service, and knowing when it's time to move on.

Key Takeaways

- **Leadership requires a mindset shift from finding problems to solving them.** Lawyers advance as great technicians — trained to issue-spot and identify risk — but leadership demands you keep doing that and pivot to solving the problem, translating technical advice into practical, step-by-step guidance that lets the business reach its goal. Sometimes it also means recognizing you don't need to be the smartest person in the room, and knowing when to lead from behind.

- **Speak the business, not just the law.** Even accomplished executives can be intimidated the moment a lawyer enters the room. The more you frame advice in the context of the business need — and talk in the business's language rather than legalese — the faster walls come down and the relationship becomes a genuine partnership rather than a one-way delivery of opinions.

- **Influence is earned; titles are merely given.** A high title may "enter the room before you do," but real impact comes from relationships built by getting out, knowing the organization and its people, and understanding what makes them tick. The skill is knowing when to let the title lead and when to take the hat off — shaping an outcome early, at the level where an issue first bubbles up, so your thinking is already being echoed by the time it reaches the executive suite.

- **Guard your authenticity — don't follow the playbook off a cliff.** Read the leadership books and take the advice, but filter everything through your own lens rather than replicating someone else's style. A memorable analogy: parenting-advice books once left a new parent completely overwhelmed until she set them aside and trusted her own instincts. Leadership is the same — your authentic self, and leaning into your genuine strengths (introvert or extrovert), is the secret sauce that lets you connect.

- **Anchor every hard conversation in "what are we trying to solve?"** As discussions spiral into more and more complexity, stopping to ask what problem you're actually trying to solve reliably simplifies things. Assume positive intent — the vast majority of operators want to do the right thing — and orient around their goal rather than showing up as the lawyer whose only contribution is why something won't work. (One panelist offered a healthy counterpoint: some resistance really is "we've always done it this way," and part of the job is pushing people to think differently.)
- **The top is isolating — so find your trusted comrade.** Senior roles lack similarly situated peers, which can be intensely isolating. You need at least one person — inside or outside the organization — with whom you can "shed the skin, take off the title," and speak freely. That person also keeps you honest and authentic by calling you out when you drift.
- **Lead constructively and calmly through crisis.** When the organization is "noisy," steadiness is stabilizing: no dramatic highs or lows, a plan already in hand ("I already know who I'm going to call"), and the discipline to see around corners before trouble arrives. People take their emotional cues from the leader, and any sensed unease reverberates through the organization.
- **Shield your team — then push forward.** A core leadership duty is to be the buffer that absorbs the pressure: debate vigorously with your team behind closed doors, but once you walk out that door, they "do no wrong" and you advocate and fight for them. Pair that cover with transparency and context so team members can lead with understanding — and teach them to stand tall and go on the offensive constructively rather than shrink into a corner.
- **Outside board and community service sharpens your leadership — with real conflict caution.** Serving on other organizations' boards is a genuine gift: you see how other leaders lead, learn to navigate complexity, and gain gravitas as a community leader. But conflicts are real; when a joint venture with a company on whose board a leader sat fell apart in a key market, the professional move was to resign the outside board rather than try to "serve two masters."
- **Know your signals for when to move on.** Growth is personal — some thrive on decades of stability, others need a new challenge the moment things get comfortable. One durable framework: a "rule of three" — if you're still learning, still growing, and still being supported, stay; when any one of those breaks, it's time to go.

Themes in Brief

- ***Technician to leader.*** The central arc — moving from spotting problems to solving them, and from legal precision to practical, business-fluent judgment.
- ***Relationships as the operating system.*** Influence, trust, crisis stability, and team protection all rest on relationships deliberately built over time.

- ***Authenticity under pressure.*** Leading as your genuine self — and knowing your own strengths, limits, and signals — is what sustains a leader through isolation and turbulence.

Reflection

Framed explicitly as an honest look behind the “everything is roses” facade of senior leadership, this conversation offered emerging and established leaders alike a realistic map of the transition into leadership. Its consistent throughline: technical excellence gets you to the table, but relationships, authenticity, steadiness under pressure, and the judgment to know your lane — and your exit — are what make leadership actually work.

> *“If you're still learning, still growing, and still being supported, stay where you are. When any one of those three breaks, it's time to go.”*
>
> **— From the Styles and Traits of Successful Leaders session**

EXPERIENCED LEADERSHIP TRACK

Governance & Organizational Stewardship

Saturday, June 27 · 3:15–4:05 p.m.

Speakers: Mark Kopson (Plunkett Cooney); Craig Holden (S.C. Holden Dispute Resolution); Cynthia Wisner (Trinity Health)

Volunteer leaders carry a distinct responsibility: to steward the organizations they serve with care, integrity, and a long view toward sustainability. Asking participants to “change hats” from legal counsel to board member, this session used the core fiduciary duties and a series of realistic scenarios to explore how boards actually make decisions, where governance ends and management begins, and what it means to be a good steward.

Key Takeaways

- **Governance directs; management executes.** Governance sets policy and direction, assures accountability and transparency, fosters trust and credibility, and — a favorite framing — aligns management with the organization's stakeholders. Management then carries out that direction. Much board conflict traces to blurred lines over which decisions belong to which. As one analogy put it: the board names the destination; the CEO, as captain, charts the course to get there.
- **The fiduciary duties are the foundation.** Board service rests on the duties of care (act as a reasonably prudent, informed person — attend, prepare, participate), loyalty (put the entity above personal gain, avoid conflicts), and obedience (follow the law, mission, bylaws, and scope of authority), plus duties of good faith and confidence. For an organization like AHLA — a DC not-for-profit — these flow primarily from state law rather than Sarbanes-Oxley or Dodd-Frank.
- **Know the materials before you walk in — the “Roosevelt Rule.”** Named for a past president who articulated it, the rule is simple: you are expected to know and understand what's in the board materials, and to attend and actively participate. Preparation isn't optional; if you can't be prepared, it may not be the right board — or the right meeting — for you.
- **Support the board's decision once it's made, even when you dissented.** You can hold and vigorously argue a minority position, but once the board decides, that becomes the organization's position; you support it externally rather than badmouthing it. If a decision is so significant you truly cannot stand behind it, the honorable path is resignation — not a public campaign against it.
- **Keep the boardroom confidential.** Board discussions must be a “safe haven” where members can speak candidly without fear it will be broadcast. Confidentiality and privacy are themselves fiduciary obligations, and breaching them corrodes the trust the board needs to function.

- **Stay out of management's lane.** A cautionary real-world case — elected university trustees who second-guessed the president, aired grievances in the press, and broke confidentiality and loyalty pledges — illustrated what happens when board members cross into management and mistake themselves for the constituents' "voice." A director's fiduciary duty runs to the organization, not to whoever elected or appointed them; the fallout cost that institution its president.
- **Reputation is one of the organization's largest assets.** In an affiliation or merger scenario, the panel was emphatic that potential reputational harm is squarely a board (stewardship) concern. Concerns about a prospective partner should be heard out fully — ideally in closed session — because losing the organization's reputation can be "game over," and one or two dissenting voices can save the board from a very bad direction.
- **Board education is preventive maintenance — and hear every side before deciding.** Onboarding alone isn't enough; periodic refreshers (and reading your committee charter at least yearly) keep directors within scope. On contested matters, wise chairs hear proponents and opponents, watch for hidden conflicts of interest, table matters for further diligence when needed, and — a seasoned habit — "never take a vote unless you already know the result," having let people say their piece beforehand.
- **Governance and management are a collaboration, not an adversarial line.** For all the "left side / right side" framing that treats the two as strictly divided, the panel stressed that in a healthy organization this is a collaborative process: agendas are set jointly by board chair and CEO, committees can helpfully vet complex questions, and organizations work best when the board is genuinely in sync with management. And because issues like AI evolve so fast, "nothing is etched in stone" — good boards revisit their decisions.

Themes in Brief

- ***The governance/management line.*** Drawing — and respecting — that line is the recurring test running through every scenario.
- ***Duties into stewardship.*** The formal fiduciary duties translate, in practice, into stewarding the organization's mission, finances, and above all its reputation.
- ***Collaboration over control.*** The healthiest boards treat governance as a partnership with management, sustained by preparation, education, confidentiality, and candid debate.

Reflection

By pairing the fiduciary fundamentals with vivid "when governance goes wrong" cases and four true-to-life scenarios, this session gave experienced professionals a practical feel for board service rather than a doctrinal lecture. Its enduring lesson: good stewardship means preparing diligently, respecting the line between direction and execution, protecting confidentiality and reputation, and — even amid vigorous debate — supporting the organization above oneself.

EXPERIENCED LEADERSHIP TRACK

Strategic Planning: Inception to Implementation

Saturday, June 27 · 4:15–5:05 p.m.

Speakers: Tom Shorter (Husch Blackwell LLP); Jamie McIntyre (Stout)

Strategic plans only deliver value when they translate into real decisions — about priorities, resources, partnerships, and tradeoffs. Opening on the well-known observation popularized by President Eisenhower — that plans themselves may be worthless, but planning is everything — this session took leaders behind the curtain of organizational strategy: why the process matters more than the binder, who belongs in the room, how plans get executed and adapted, and how honest conversation (and the occasional consultant) makes the difference.

Key Takeaways

- **The value is in the planning, not the plan.** People dismiss strategic planning because "plans just sit on a shelf" — but that misses the point President Eisenhower was making. The process itself surfaces issues you hadn't considered, forges unified direction, and aligns everyone toward the same goals. Strategic planning is not a calendar event; it's an operating discipline.
- **Unified direction is the whole point.** A vivid Coast Guard lesson — crews racing rowboats into the surf — showed that the team that paused to plan beat the teams that sprinted first; without a plan, the boat flips and washes back to shore. Strategy exists to get everyone rowing the same way toward agreed milestones.
- **Plan for all three phases: create, execute, adapt.** Building the plan is a huge lift, but it's only the first phase. Execution has to be designed into the plan from the start (the classic failure is a beautiful plan with no mechanism to carry it out), and adaptation is essential because nothing is static — a law changes, or a COVID arrives that no plan anticipated, and leaders must be flexible enough to shift course.
- **Spend real energy on who is in the room.** One of the most common — and most fatal — mistakes is failing to think through who should participate. A board that developed a plan without involving organizational leadership produced a polished binder no one was bought into. Strategic planning works best when triggered by leadership but pursued collaboratively, so the board's outside perspective augments management's on-the-ground knowledge.
- **Talk to the people who actually do the work.** Plans handed down without consulting frontline staff go wrong in memorable ways — a hospital renovation that routed the path to the morgue past the surgical family waiting room; a cost-cutting supply initiative that never consulted surgeons and buried central supply in expiring consignment stock. Involving the right operational voices early prevents expensive, avoidable failures.

- **A good plan builds in contingencies and priorities — spend on priorities, not urgencies.** If you don't anticipate where resources and effort will be needed, you'll end up spending them on urgencies rather than priorities — nimble leadership, not reactive leadership. Good plans force hard conversations and difficult decisions early, and build in contingencies for conflict, obstacles, and regulatory or budget constraints.
- **Make the plan intelligible — complexity kills adoption.** Universal reference points and a clear, common framework turn a plan into a communication tool for boards, teams, investors, and partners. The gatekeeper to buy-in is that the plan is succinct, comprehensible, and accessible to everyone who needs to act on it; complexity kills engagement and operationalization.
- **Take time to get mission and vision right — and use consultants where they add value.** Confusing a financial target ("we want to be a $50 billion organization") for a mission that actually inspires people is a common trap; distinguishing mission, vision, and values deserves real time. A skilled outside consultant adds value by providing independence, being the "reality mirror" that delivers hard news, and drawing information out of reticent participants — but fit matters enormously, so do your homework on a consultant's skill set and style before engaging, since a facilitator who clashes with the group's energy can sink the whole effort.
- **Invest in working relationships before you plan.** If board and leadership relationships are already strained, entering strategic planning from that "challenged position" makes the process very hard. Strategic planning doesn't happen in a vacuum — it exposes underlying dysfunction — so investing in cohesion, and understanding colleagues' values, priorities, and quirks (including generational communication differences, right down to what "out of pocket" or a thumbs-up emoji signals), is what carries a team through.
- **The leader's job is the "why," and staying adaptable.** Leaders are critical to both implementation and adaptation, and they must be able to articulate the why behind the plan — not just "that's what the team came up with." Leadership that's too rigid is brittle; leadership that pivots too easily erodes confidence. And nothing kills conviction faster than a leader who gives no roadmap, shows up only as a status-updater, and then points out what went wrong.

Themes in Brief

- ***Process over product.*** The binder is not the point; the thinking, alignment, and hard conversations the process forces are where the value lives.
- ***The right people, the right relationships.*** Who's in the room — and the health of the relationships among them — determines whether a plan is real or ornamental.
- ***Adaptive, communicated leadership.*** Plans must be executed, adapted, and above all explained; a leader's ability to convey the "why" turns a document into direction.

Reflection

Anchored by two leaders who had seen strategic planning done both well and badly, this Leadership Track session cut through the cynicism many bring to the topic. Its lasting message: a plan is only as good as the process that built it, the people who shaped it, and the leader who can explain its purpose — and the discipline of planning, more than any binder, is what actually moves an organization forward.

Looking Ahead

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