

YOUR BOARD ENGAGEMENT CHECKLIST

Use This Tool	When	How
Aspirations	<ul style="list-style-type: none"> Your Board is too focused on problems Your Board is struggling with finding common ground to act You need to get the Board in the right “frame” for a meeting 	<ul style="list-style-type: none"> This works great to start retreats or meetings You can do this in a quick 15-minute hit but it’s better when you have more time Use the facilitator’s guide that comes with the three questions
The 3 A’s Videos and Reflection Questions	<ul style="list-style-type: none"> Your Board is struggling with why public knowledge matters You want your board to be part of “owning” the need to transform the culture of the organization 	<ul style="list-style-type: none"> Use one video per meeting or all four at a longer retreat Have them use the reflection questions in groups During the de-brief push them to think about what you need to reflect the 3 A’s (it all comes back to public knowledge)
The Ask Tool	<ul style="list-style-type: none"> Your Board likes the idea of engagement but doesn’t seem to “get” what you’re talking about You want them to experience what a different kind of conversation sounds like 	<ul style="list-style-type: none"> Have them use this on each other at a board meeting or retreat then reflect on it by asking, “What did you make of that,” and “What was different about that conversation?” and “How would doing this more benefit us?” As a fun alternative, have them phone someone from a friend’s contact list (someone the friend knows will be amenable) and use the questions
The Training Videos	<ul style="list-style-type: none"> You want to keep “planting seeds” You feel like you need soft reinforcement on why this matters 	<ul style="list-style-type: none"> Periodically and informally e-mail them a video clip (every month for example) Send one out ahead of a meeting and ask that they watch it and have a brief discussion when you’re together (5 min.)
The Turn Quiz	<ul style="list-style-type: none"> The board can’t seem to get what inward v. outward is You have new board members who don’t get it yet 	<ul style="list-style-type: none"> Use the Turn Outward video as a starting point Give them the quiz and have them answer it on their own Have them pair up and discuss their answers then debrief why they answered the way they did