BOARD LESSON PLANS SHORTS

GOVERNANCE

Presented by
Stetson University
Center for Community Engagement

BOARD SHORTS

Board Shorts: Bite-Sized Learning for Stronger Nonprofit Leadership

Board Shorts is an ongoing professional development series created in direct response to requests from nonprofit leaders seeking accessible, meaningful training opportunities for their boards and leadership teams. Each module is designed to deliver high-impact learning in approximately 30 minutes, making them easy to incorporate at the beginning of regular board meetings or during leadership retreats without overwhelming busy schedules.

These short, focused sessions combine engaging video content with a concise lesson and discussion guide on a key topic in nonprofit leadership. Designed to spark conversation and deepen understanding, Board Shorts help boards strengthen their knowledge and capacity in essential areas such as diversity, effective governance, leadership dynamics, storytelling, and organizational sustainability.

One of the key features of Board Shorts is their ease of use. They are intentionally designed so that anyone can facilitate them without prior expertise in the topic. Each module provides all the materials and guidance needed to lead a productive conversation and learning experience, making them ideal for organizations of all sizes and experience levels.

Because they are modular and adaptable, Board Shorts can be used individually as stand-alone trainings or woven into a year-round board development plan. The series is continuously expanding based on the evolving needs of nonprofit organizations, ensuring that each new installment remains timely, relevant, and responsive to the challenges boards face today.

Whether you’re looking to build shared language around inclusion, clarify board roles and responsibilities, or simply invest in your team’s ongoing growth, Board Shorts offers a practical and impactful way to strengthen leadership one meeting at a time.

RESOURCES

Stetson Center for Community Engagement Nonprofit Leadership Development Programs

- https://www.stetson.edu/community

Community Tool Box

- https://ctb.ku.edu/en

DIY: Development, Impact, & You - Practical Tools to Trigger and Support Social Innovation

- https://diy-toolkit.org/

HOW TO USE

Board Shorts is a flexible professional development series designed for nonprofit boards and leadership teams. Each module takes about 30 minutes and can easily be adapted to fit shorter meeting times. No prior expertise is needed to lead or participate. Each session includes a short lesson plan, a video (in most cases), and a discussion or activity to help boards learn together and apply new concepts right away.

Board Shorts were created to:

- Strengthen board knowledge and confidence.
- Encourage continuous learning without requiring long trainings or external facilitators.
- Build shared understanding and alignment among board members over time.

Format Options

<u>Option 1: Full 30-Minute Session</u> - Each full session includes:

- Video Lesson (10 to 15 minutes) — Play the short curated video to introduce core ideas. (Not all modules have a video component.)
- Discussion & Activity (10–15 minutes) — Use the included worksheet or guiding questions to connect the lesson to your organization's work.
- Identify one practical takeaway or change to implement.

<u>Option 2: Split into Two 15-Minute Segments</u> - When you only have a few minutes per meeting, split each module across two sessions:

- *Part 1 – Watch & Reflect (15 minutes)*
    - Introduce the topic and show the video.
    - Encourage members to consider how the topic shows up in your organization before the next meeting.
- *Part 2 – Discuss & Apply (15 minutes)*
    - Begin by revisiting key points from the previous session.
    - Complete the activity or small group discussion.
    - Identify one practical takeaway or change to implement.

HOW TO USE

How to Facilitate a Session

- Preview the Materials - In most cases, the only thing needed is the presentation itself. Some session have handouts or worksheets to accompany the presentation and that is indicated in the lesson plan.
- Review the video and lesson plan ahead of time. Decide whether to use the full or split format.
- Set the Stage - Share the learning objective so participants know why the topic matters.
- Play the Video - Most sessions include a video.
- Lead the Discussion/Activity - Use the discussion questions included in the lesson plans or on the presentation slides. Feel free to add your own. Handouts and Activity Worksheets are included in the lesson plans, along with any Activity instructions.
- Wrap up with one insight or action the board can apply before the next meeting.

Suggested Uses

- Begin each board or committee meeting with a mini learning segment.
- Integrate into annual retreats or orientation sessions.
- Use selectively for targeted board development topics.
- Combine several modules for a themed training series (e.g., “Governance & Leadership” or “Fundraising Foundations”).

Tips for Success

- Rotate facilitators so different board members lead each session.
- Keep discussions focused but conversational.
- Encourage personal connections. How does this topic affect our board, our mission, and our community?
- Revisit completed modules during annual evaluations to reflect on progress.

Each Board Shorts module includes:

- Lesson Plan, including discussion questions or activities
- Video Link - where applicable
- Handout or Worksheet - where applicable

BOARD GOVERNANCE SHORTS

GOVERNANCE

MODULE 1: MISSION, VISION, AND VALUES

Clarify the guiding principles that shape your organization's direction. This session explores how mission, vision, and values work together to inform decision-making and ensure that every action aligns with purpose.

- Video (18 minutes) - How Great Leaders Inspire Action | Simon Sinek | TED
  - https://www.youtube.com/watch?v=qp0HIF3SfI4
- Mission - What is your organization's mission? Does it answer the questions on the slide?
- Vision - If you achieved your mission, what would the world look like?
- Values - Has your organization established a set of values? What "rules" guide your work?
- Outcomes - What does success look like for your organization? How do you measure that?

MODULE 2: BOARD DUTIES

Understand the legal, ethical, and practical responsibilities of board service. Learn about the "Three Duties" framework — Duty of Care, Loyalty, and Obedience — and how to apply them in real-world governance situations.

- Video (14 minutes) - Modern nonprofit board governance -- passion is not enough! | Chris Grundner | TEDxWilmington
  - https://www.youtube.com/watch?v=qp0HIF3SfI4
- Three Key Duties - Review each slide. Discuss what each of these duties looks like in practice,
  - Care
  - Loyalty
  - Obedience
- Fundraising - Fundraising is a vital responsibility of nonprofit board members. Discuss the 4 fundraising responsibilities with your team. What action steps can each board member take to fulfill their fundraising responsibilities?

MODULE 3: TEAM CULTURE

Strong governance depends on strong relationships. This module focuses on communication, collaboration, and trust-building within the board. Participants will identify ways to create an inclusive and productive culture that supports shared leadership.

- Video (10 minutes) - Trusting Teams | Simon Sinek | The Optimism Library
  - https://www.youtube.com/watch?v=W5qQJhe7sLE&t=38s
- Managing vs Coaching - Discuss the differences between the two and talk about situations that each has a role.
- Feedback - Are you comfortable giving feedback? How do you like to receive feedback?
- Culture - What is the culture you want in your organization? Is that the culture you have achieved? If not, what steps can you take to get there?
- Well-being - How do you take care of yourself? How do you take care of others? What are steps the organization can take to care for the well-being of stakeholders?

GOVERNANCE

MODULE 4: COMPLIANCE

Explore the systems and structures that keep your organization accountable. This modle introduces 4 practical checklists and assessment tools for your organization.

- Review the Florida Nonprofit Alliance Legal Compliance Checklist
  - https://www.flnonprofits.org/legal-compliance-checklist
- Review the Checklist for Accountability
- Review the Website Transparency Checklist
- Review the Alliance for Justice Advocacy Self-Assessment
  - https://afj.org/resource/advocacy-check-up-nonprofit-self-assessment/
- Video (18 minutes) - The way we think about charity is dead wrong | Dan Pallotta | TED2013
  - https://www.ted.com/talks/dan_pallotta_the_way_we_think_about_charity_is_dead_wrong?subtitle=en

MODULE 5: STRATEGIC RECRUITING

Build a strong, diverse, and high-functioning board through intentional recruitment strategies. This module covers identifying gaps, understanding board needs, and finding the right people to support mission-driven governance and sustainability.

- Review and Complete Board Composition Matrix

MODULE 6: COMPREHENSIVE ONBOARDING

Set new board members up for success. Participants will explore how to create an onboarding process that equips incoming leaders with the knowledge, tools, and relationships they need to contribute meaningfully from day one.

- Review and Discuss the 90 Onboarding Roadmap.
- What elements need to be put in place to effectively us the roadmap?

MODULE 7: SUCCESSION PLANNING

Good governance includes preparing for the future. This session covers strategies for identifying and developing future leaders, ensuring continuity of mission, and managing transitions with intention and stability.

- Discuss each of the key steps. Where does your organization stand on each of these steps?
- What elements of the transition document do you already have? Create action items and assign responsibility to the appropriate people to gather or create everything you need for a completed transition document.

BOARD MATRIX COMPOSITION

How do you know what your Board needs?

A Board Composition Matrix is a visual planning tool that helps nonprofit leaders assess their current board members' skills, experience, demographics, and perspectives compared to what the organization needs to advance its mission and strategic goals. It provides a clear, data-informed picture of how well the board aligns with the organization's priorities and where there are gaps in expertise, representation, or engagement.

By mapping out who currently serves, what strengths they bring, and what competencies or voices are missing, the matrix transforms board recruitment from a reactive process into a strategic and inclusive effort. It ensures that new members are added intentionally to strengthen governance, expand community connections, and reflect the diversity of those the organization serves.

It's essentially a snapshot of who's at the table and who's missing.

ORGANIZATIONAL VALUES ALIGNMENT

	1	2	3	4	5	6	7	8	9
Commitment to Mission & Vision									
Alignment with Core Values									
Inclusive Leadership & Collaboration									
Willingness to Champion the Organization									
Respectful Communication Style									

PROFESSIONAL SKILLS & EXPERTISE

	1	2	3	4	5	6	7	8	9
Finance / Accounting / Budget Oversight									
Legal / Compliance / Risk Management									
Fundraising / Development / Donor Relations									
Marketing / Branding / Communications									
Public Relations / Media / Advocacy									
Strategic Planning / Org Development									
Human Resources / Talent Development									
Nonprofit Governance / Board Leadership									
Education / Youth Development									
Health & Wellness / Behavioral Health									
Event Planning / Logistics									
Technology / Data / Cybersecurity									
Facilities / Real Estate / Construction									
Policy / Government / Civic Leadership									
Diversity, Equity & Inclusion (DEI)									
Program Evaluation / Research									

LIVED EXPERIENCE & REPRESENTATION

	1	2	3	4	5	6	7	8	9
LGBTQ+ Community Representation									
BIPOC Representation									
Gender Diversity									
Disability / Accessibility Experience									
Youth / Emerging Leader (under 30)									
Senior / Older Adult Perspective									
Parent / Caregiver Perspective									
Faith / Spiritual Community Connection									
Veteran / Military Connection									
Socioeconomic or Geographic Diversity									

GEOGRAPHIC & COMMUNITY REACH

	1	2	3	4	5	6	7	8	9
City or Region									
County / Regional Representation									
Proximity to Program or Service Areas									
Urban / Suburban / Rural Representation									

NETWORKS & INFLUENCE

	1	2	3	4	5	6	7	8	9
Local Business or Corporate Ties									
Civic / Government Connections									
Education Sector (Schools, Colleges)									
Healthcare / Wellness Sector									
Arts & Culture Community									
Faith-Based Networks									
Media / Public Relations Connections									
Philanthropy / Foundation Contacts									
Advocacy or Policy Networks									

ENGAGEMENT & CAPACITY

	1	2	3	4	5	6	7	8	9
Time Availability (Low / Moderate / High)									
Financial Willingness (Give or Get Level)									
Event Participation (High / Medium / Low)									
Leadership Potential (Emerging / Established)									
Commitment to Learning									

How to Use the Board Composition Matrix

Step 1: Gather Information and Fill-in Matrix

Start with an accurate list of current board members and their details.
Collect or verify:

- Organizational Values Alignment
- Professional Skills & Expertise
- Lived Experience & Representation
- Geographic & Community Reach
- Networks & Influence
- Engagement & Capacity

Tip: Use a 1–3 scale (1 = none, 2 = moderate, 3 = strong) or simple checkmarks to mark each category.

Step 2: Identify Organizational Priorities

Review your current strategic plan or annual goals.
Ask:

- What major initiatives or challenges are we tackling this year?
- What expertise, relationships, or lived experiences would help us achieve them?

Highlight identified needs in the matrix as priority areas.

Step 3: Analyze and Discuss

Once filled, step back and look for patterns:

- Where are there clusters of strength?
- Which skills, experiences, or identities are missing?
- Are certain regions, age groups, or communities underrepresented?
- Do leadership roles reflect the diversity of the board as a whole?

Use this as a conversation starter not a scorecard. It's about insight, not evaluation.

Step 4: Take Action

Turn the insights into strategy:

- Recruit intentionally: Create Job Descriptions for the top 2–3 identified gaps.
- Plan for succession: Note which terms are ending soon and where new leadership is needed.
- Rebalance: Assign or mentor members to fill internal gaps.

Update the matrix annually before elections or board retreats. Over time, it becomes your governance dashboard, tracking how your board evolves alongside your organization.

Use the matrix to build a board that not only governs well, but represents, reflects, and amplifies the community it serves.

BOARD ONBOARDING 90 DAY MAP

There’s a better way to onboard.

The 90-Day Onboarding Map is a structured roadmap designed to help new board members move from orientation to active, confident participation. It recognizes that onboarding is more than handing someone the strategic plan and telling them the mission. It’s about helping them understand how the organization actually lives that mission through people, programs, and community impact.

Over three months, the process intentionally blends information, relationships, and experience: welcoming members into the culture, pairing them with a mentor, guiding them through governance and financial basics, and creating early opportunities for meaningful engagement.

By the end of 90 days, new members feel equipped, connected, and invested. They are not just ready to serve on the board, but to lead and advocate for the organization’s success.

The 90-Day Board Onboarding Map is broken into 4 Phases.

Phase 1: Pre-Boarding (Days 0–14)
Lays the groundwork before the first meeting by welcoming new members, setting expectations, and connecting them with a board buddy. This phase focuses on preparation, ensuring they have the right materials, access, and personal introductions to start strong.

Phase 2: Orientation (Days 15–30)
Builds understanding of the organization’s mission, programs, finances, and governance structure. Orientation turns abstract documents into real context, helping new members see how their role supports the organization’s goals and impact.

Phase 3: Activation (Days 31–60)
Moves new members from learning to doing. They attend meetings, join a committee, and begin contributing ideas, questions, and actions that align with their skills and passions. Engagement becomes tangible and meaningful.

Phase 4: Integration & Reflection (Days 61–90)
Solidifies belonging and sets the stage for long-term success. New members reflect on what they’ve learned, meet with leadership to set individual goals, and are formally welcomed as full, confident contributors to the board’s work.

90 DAY ONBOARDING CHECKLIST

Phase 1: Pre-Boarding (Days 0–14)

Goal: Welcome the new member and set them up for success before their first meeting.

Checklist:

- Send official welcome email from the Board Chair or Executive Director.
- Provide digital or printed welcome packet containing the mission, vision, values, strategic goals, board roster, and meeting calendar.
- Assign a Board Mentor and send an introductory message connecting the two.
- Schedule a brief welcome call or coffee chat with the Chair or ED.
- Collect signed forms such as conflict of interest, confidentiality agreement, and code of conduct.
- Provide access to board materials and tools (shared drive, board portal, group chat, email list).
- Add new member to all relevant communication lists and committee invitations.
- Announce the new board member internally to staff and existing board members.

Success Indicator - New member feels welcomed, knows what to expect, and understands communication channels and meeting logistics.

Phase 2: Orientation (Days 15–30)

Goal: Build foundational understanding of the organization, its mission, and governance structure.

Checklist:

- Schedule and conduct formal board orientation (in-person or virtual).
- Review mission, vision, strategic plan, and current priorities.
- Provide an overview of finances, including budget, revenue streams, and reporting format.
- Introduce the board’s role in fundraising, advocacy, and governance.
- Invite the member to a “Meet the Mission” experience (site visit, program tour, community event).
- Encourage attendance at a committee meeting to observe how board work happens.
- Share recent board minutes and annual report for context.
- Conduct a 30-day check-in with the Board Mentor to discuss questions and first impressions.

Success Indicator - Member understands how the board functions, how the mission is lived out, and where they can best contribute.

90 DAY ONBOARDING CHECKLIST

Phase 3: Activation (Days 31–60)
Goal: Transition from observer to contributor through engagement and participation.

Checklist:
- Confirm the member’s committee placement based on interest and skills.
- Ensure the member attends their first full board meeting.
- Encourage participation in discussion or decision-making (first motion, question, or idea).
- Have the member introduce themselves at a meeting and share their “why I joined” story.
- Assign a small, achievable task (e.g., assist with event planning, review a document, join an outreach effort).
- Invite them to attend an organizational event or public activity as a representative of the board.
- Provide ongoing support through mentor check-ins and reminders.

Success Indicator - Member actively contributes to at least one meeting or committee and begins to feel part of the board’s team and culture.

Phase 4: Integration & Reflection (Days 61–90)
Goal: Reinforce belonging, gather feedback, and set goals for the year ahead.

Checklist:
- Send a brief self-reflection or onboarding feedback form (confidence, clarity, engagement).
- Schedule a 90-day review conversation with the Board Chair or ED.
- Review the member’s job description and set 1–3 personal goals for the year.
- Invite participation in professional development sessions.
- Conduct final Board Mentor meeting to reflect on progress and next steps.
- Officially recognize the member at a meeting or in communications (“Welcome fully aboard!”).
- Add notes to Governance records for tracking onboarding completion.

Success Indicator - Member demonstrates understanding of mission and governance, has clear goals for ongoing engagement, and feels fully integrated into board culture.