

# Charting Your Board Service Journey – Let's Plan This Exciting Adventure

Tampa Bay PDA Chapter – Summer Session Zoom Webinar



## Week # 1 – Welcome, Kick-off + Group Orientation Call

June 8<sup>th</sup> from 6 – 7:30 pm

- Utilize the inverted pyramid, swim lane diagram to serve as the virtual treasure/scavenger hunt map for the balance of the program
- Introduce the corresponding supporting swim lane MS-Word docs as trip brochures depending on an attendee's, long-term aspirational board, or board role destinations (Aspiring, Seated, and Highly Experience Board swim lanes).
- Birds of a Feather* - Let's discover some like-minded travel companions to make the journey more fun. Have participants answer a series of *survey questions* to find like-minded directors with similar backgrounds interested in similar board work.
- Mind the Knowledge Gap* – Self-guided questions and answers for key director knowledge areas.

## Week # 2 – Preparation & Packing List for Your Bucket List Destination

June 22<sup>nd</sup> from 6 – 7:30 pm

Depending on your destination, we will likely need to create a packing list to make the trip as enjoyable as possible.

- Is a Passport required? (Board Resume & Board Bio) – Available resources & best practices.
- The proper training, experience & fit for purpose skills – translating professional experience into board value.
  - Establishing the right balance of Emotional Intelligence (EI), Intelligence Quotient (IQ) & continuous Learning Aptitude (LA)
  - Emphasis on creating an individual skills gap analysis.
  - Setting a highly customized, individual BoD professional development plan.
- Practice like you play – The importance of tabletop exercises and other real-world simulations to gain knowledge & experience.
- Trip Insurance? Explain how D&O is synonymous with traveler's trip insurance.
  - It would be best to prepare if or more likely when things do not always go as planned during your board journey.
- We should check to see if there are any travel restrictions or health advisories....
  - Risk Management synonymous with Special Perils, Gen Liability, and Cyberbreach Insurance

## Let's explore some popular milestones and paths you might take during your board journey.

### Week # 3 Destination Option #1 – Let your passion drive your service.

July 6<sup>th</sup> from 6 – 7:30 pm

*Aspiring Director Swimlane* – NGOs, NFPs, Faith-based, Higher Education, Community Healthcare, Member-focused Orgs.

Bonus Topic: Tour Guides & Docents - Specialist to help make the trip more informative & enjoyable

### Week # 4 Destination Option #2 – Fuel your passion & get licensed to thrill

July 20<sup>th</sup> from 6 – 7:30 pm

*Seated Director Swimlane* Highlight the Larger, Private Companies, Special Boards, Family Office

Bonus Topics: Board of Director Certifications, Diversity, Accreditations & Higher Ed programs + Core Committees opportunities

### Week # 5 Destination Option #3 – Trailblazing, giving back, and sharing your passion w/ aspiring directors

Aug 10<sup>th</sup> from 6 – 7:30 pm

*Highly Experience Director Swimlane* - More complex private companies, public, international boards

Bonus Topic: Transition considerations moving between public & private boards.

## Week # 6 Luau themed Capstone Event – Share your dream director roles and destinations

Aug 24<sup>th</sup> from 6 – 7:30 pm

Anyone interested in sharing their board bucket list & adventure path based on what they learned in the cohort.

Each participant can share a couple of slides to highlight their preferred path, committee interest & ultimate board service goals.

A few suggestions on what you might want to include in your bucket list presentation:

- Who would you like to meet or travel with on the journey? (identify potential board buddies & mentors)
- What do you need to pack and/or prep for their trip? (Skills, experience, or education needs)
- What are some of your top destinations on your list? (Types of organization, committee participation or leadership roles)
- Is there a logo wish board (visualize snapshots of key board milestones, roles, or organizations) in the format of scrapbook pages that captures your specific boards, roles, or experiences you would like to check off your board bucket list? (visualizing goals)