



Learning Plan

Welcome! This learning plan checklist will help you navigate the videos and online resources.

Circle the Course You Plan to Complete:

Boards Finance Legal Planning

CHECKLIST

<input type="checkbox"/>	Watch the Introduction video	Thoughts on how this relates to your organization?																																												
<input type="checkbox"/>	Test your knowledge	What areas do you need to focus on based on your test results? 1) _____ 2) _____ 3) _____																																												
<input type="checkbox"/>	<p>Start learning: Circle the topics related to what you most need to focus on.</p> <table border="1" data-bbox="115 915 852 1446"> <thead> <tr> <th>Boards</th> <th>Finance</th> <th>Legal</th> <th>Planning</th> </tr> </thead> <tbody> <tr> <td>Cause</td> <td>Balance sheets</td> <td>Federal</td> <td>Prepare</td> </tr> <tr> <td>Roles</td> <td>Income statements</td> <td>State</td> <td>Listen</td> </tr> <tr> <td>Board development</td> <td>IRS Form 990</td> <td>Fundraising</td> <td>Envision</td> </tr> <tr> <td>Board operations</td> <td>Giving</td> <td>Employment</td> <td>Plan</td> </tr> <tr> <td>Fundraising</td> <td>Oversight</td> <td>IP</td> <td>Execute</td> </tr> <tr> <td></td> <td></td> <td></td> <td>Evaluate</td> </tr> </tbody> </table> <p>Download the supporting kits for topics of interest.</p>	Boards	Finance	Legal	Planning	Cause	Balance sheets	Federal	Prepare	Roles	Income statements	State	Listen	Board development	IRS Form 990	Fundraising	Envision	Board operations	Giving	Employment	Plan	Fundraising	Oversight	IP	Execute				Evaluate	What is your plan? Prioritize the topics you want to focus on. <table border="1" data-bbox="937 957 1531 1425"> <thead> <tr> <th>Topic</th> <th>By when</th> </tr> </thead> <tbody> <tr><td> </td><td> </td></tr> <tr><td> </td><td> </td></tr> <tr><td> </td><td> </td></tr> <tr><td> </td><td> </td></tr> <tr><td> </td><td> </td></tr> <tr><td> </td><td> </td></tr> <tr><td> </td><td> </td></tr> </tbody> </table>	Topic	By when														
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<input type="checkbox"/>	<p>Get supporting materials. Identify what additional materials you will need to make progress. <input type="checkbox"/> Key Documents <input type="checkbox"/> Tools</p>																																													
<input type="checkbox"/>	<p>Reflection & Next Steps What progress have you made? (Great work!) What progress do you still need to make? (Start this process over again.)</p>																																													