

Board Engagement Roles



A card set for boards that want to lead with clarity, cohesion, and confidence.

Engagement is a design choice, not a personality trait. When directors take on a specific role for the meeting, quieter voices get a structural reason to speak, dominant voices get a frame for stepping back, and challenge starts to feel like the job — not a personal critique.

How to use this card set

At the start of each meeting, assign two to four directors a role from this set. Rotate roles every meeting so every director gets to step into each one over the year. Give each director the card for their role. Build in two minutes at the end of the meeting for each role-holder to share what they noticed.

***A gentle reminder:** These roles aren't theatre. They're a structural invitation to do the hard, generous thinking that good governance requires.*

The four roles

1. **The Skeptic** — challenges assumptions, surfaces risk.
2. **The Questioner** — probes for depth, ensures all voices are considered.
3. **The Steward** — watches process, learning, and values alignment.
4. **The Advocate** — listens for whose voices and experiences are present, and whose are missing.

The Skeptic

Challenge group assumptions and surface what could go wrong.

When to use this role

Before any significant decision is finalized.

Key questions to bring to the table

- What assumptions are we making — and which ones haven't we tested?
- How would our conclusion change if a key assumption proves wrong?
- What's the worst-case scenario, and how would we explain this decision in public?
- Are we overconfident here? What evidence might we be ignoring?

Sample phrases

"Let's revisit our assumptions for a moment..."

"What could go wrong here?"

"What would the strongest case against this be?"

The Questioner

Probe for depth and inclusivity — the questions that haven't been asked.

When to use this role

Throughout the discussion, especially when the room agrees too quickly.

Key questions to bring to the table

- Who sees this differently — and who's missing from the conversation?
- What's the quiet voice in the room telling us?
- What are we avoiding or reluctant to name?
- How does this look from the perspective of those most affected?

Sample phrases

"Who else needs to be heard before we move on?"

"What haven't we asked yet?"

"What's the question underneath the question?"

The Steward

Watch the process, the learning, and whether we're modelling our values.

When to use this role

Throughout the meeting; report out at the end.

Key questions to bring to the table

- What's working in how we're making this decision? What isn't?
- Did we take the time we needed, or rush past something important?
- Did we model our organization's values in how we worked together?
- What did we learn as a board today, and how can we do better next time?

Sample phrases

"Let's step onto the balcony for a moment."

"What can we learn from how we handled this?"

"Did we model our values just now?"

The Advocate

Listen for whose voices, communities, and lived experiences are present — and whose are missing.

When to use this role

Throughout the meeting, especially during decisions that affect people we serve.

Key questions to bring to the table

- Whose voice is shaping this decision? Whose isn't?
- What assumptions are we making about the people most affected?
- How will this decision feel for the people we serve — dignity, safety, trust?
- Who benefits, who carries the cost, and how will we know?

Sample phrases

"Whose perspective are we deciding on behalf of, without?"

"Have we heard from the people closest to this?"

"What would change if we centred lived experience here?"