



STARTING AN ADVISORY BOARD CHECKLIST

Starting an Advisory Board	Person Responsible	Month/Quarter	Completed (Y/N)	Key Resource
Review NAF Advisory Board resources on ASH and determine what resources might be valuable at this point	Academy Director	Quarter 2		AdvisoryBoard Introduction Video
Research companies related to academy theme and potential partners	Academy Director	Quarter 3		https://fortune.com/ranking/fortune500/ https://www.glassdoor.com
Consider partnering with an industry champion to identify professionals to invite to the kick off meeting	Academy Director	Quarter 3		
Plan agenda and participants for kick off meeting	Academy Director	Quarter 3		
Consider checking in with NAF Portfolio Manager on Kick Off Meeting Plans	Academy Director	Quarter 3		
Invite professionals to Kick Off meeting	Academy Director	Quarter 3		NAF AB and Local Partners one pager
Host Kick Off meeting and distribute Partner Interest Forms	Board Chair and Academy Director	Quarter 3		Partner Interest Form, NAF Guide to Recruiting Partners
Review Partner Interest Forms	Academy Director	Quarter 3		
Create contact list and document sharing folder	Academy Director	Quarter 3		
Determine a Board Chair (if not already determined)	Academy Director	Quarter 4		
Make agenda for first Board meeting and invite partners to the meeting	Board Chair and Academy Director	Quarter 4		
Host first Board Meeting	Board Chair and Academy Director	Quarter 4		

Invite professionals to join the board	Board Chair and Academy Director	Quarter 4	Advisory Board Invitation Letter
Host second Board Meeting	Board Chair and Academy Director	Quarter 4	
Determine Vice Chair, Secretary, and Treasurer positions	Board Chair and Academy Director	Quarter 4	Advisory Board Roles and Responsi
Host third Board Meeting	Board Chair and Academy Director	Quarter 1	
Use NAF template and create By Laws	All Board Members	Quarter 1	NAF Bylaws Template
Ask members to complete SWOT Analysis and review information	All Board Members	Quarter 2	Advisory Board SWOT Analysis
Host Board Meeting for Strategic Planning	Board Chair and Academy Director	Quarter 2	Strategic Planning Template
Create a list of proposed dates for ODWBL for the year and complete the Work-Based Learning Plan and Calendar .	Board Chair and Academy Director	Quarter 2	WBL Learning Plan and Calendar
Attend NAF Next summer conference	Select Members and Academy Director	Quarter 3	
Thank members for their service	Board Chair and Academy Director	Quarter 3	RecognitionTips
Share and attend NAF Advisory Board webinars and trainings	All Board Members	Ongoing	
Review NAF Advisory Board Newsletters	All Board Members	Monthly	