Advisory Board Development Guide

Academy Design Plan | Supports Strategic Actions 2.1–2.3

Overview

Use this guide to build, launch, and strengthen your advisory board for 2.1. It walks your academy team through five phases, from recruiting partners to sustaining an established board, and links the templates and resources for each step.

Who it's for. Year of Planning academies can follow the phases in order across the planning year and into launch year. Fast Track and open academies can start at the phase that matches where their board is now (see Where to Start).

Evidence vs. supporting resources. Each phase labels its resources so your team knows what to upload:

- **Evidence template** – complete it and upload it as evidence for the strategic action named. Open academies submit evidence only when working toward Model+.
- **Supporting resource** – use it to plan or do the work. Do not upload it as evidence.

Timing. The months below assume your Year of Planning starts at the beginning of the school year, with calendar-year quarters (Q1 is January–March) in parentheses. If your academy starts at a different time, keep the phase order and adjust the dates. All YOP evidence is due by May 31.

Where to Start

Find the row that describes your board today and begin at that phase.

If your academy...	Start at	Typical timing
Has no advisory board or partner list yet	Phase 1: Research & Recruit	August–September (Q3)
Has a list of potential partners but no board meetings yet	Phase 2: Kick Off & Form the Board	October–December (Q4)
Has members meeting but no officers, by-laws, or support plans	Phase 3: Structure the Board	January–March (Q1)
Has a structured board but no current strategic plan	Phase 4: Plan for Launch	April–May 31 (Q2)
Has an established board with a current strategic plan and by-laws	Phase 5: Sustain & Grow	Launch year and every year after

Open academies can use Phase 5 each year and return to earlier phases to rebuild membership, refresh by-laws, or strengthen a board that has lost momentum.

Advisory Board Roles

The board sets its officer roles and term lengths in its by-laws (2.1.c). For a new board, the academy lead and principal may select the initial chair(s) to serve until the first officer election.

Role	What they do
Academy lead (non-voting, ex officio)	Serves as the board's main liaison to the academy, coordinating, leading, and advocating for the academy program.
Chair or co-chairs	Serve as the main liaison between the business community, board members, and the academy. Prepare and facilitate meetings and keep the board focused on its purpose.
Secretary	Records and distributes minutes, keeps the roster and contact information current, and maintains the Advisory Board Impact Dashboard.
Treasurer (if applicable)	Records and reports fundraising and other financial activity at each meeting.
Immediate past chair	Supports leadership transitions, continuity of board projects, and new member orientation.
Membership development chair (optional)	Leads recruitment and onboarding of new members and partners.
Advisory board members	Serve on at least one committee, contribute to the strategic plan, provide or secure WBL experiences, and promote the academy in the community.
Advisory board interns	Support board operations, such as recording minutes, while modeling internship best practices.

Not every industry partner can or should serve on the board, because membership takes significant time. Partners who can offer only WBL activities or occasional support are still valuable and do not need board membership.

Phase 1: Research & Recruit

Strategic action	2.1.a Recruit Advisory Board Members
Typical timing	August–September (Q3)
Lead	Academy lead, with the academy team

Goal: Identify employers, postsecondary, and community leaders related to your career pathway and start a prospect list.

Action steps

1. Review the Advisory Board section of the YOP Guide and watch the Introduction to Advisory Boards video as a team.
2. Hold the academy team meeting using the ADT Meeting Agenda – Advisory Board to set a recruitment lead, priority organizations, and a target date.
3. Complete the Advisory Board Partner Recruitment Activity. Ask every team member to brainstorm from their personal and professional networks.
4. Identify an industry champion who can help you reach other professionals.
5. Add your strongest prospects to the Advisory Board Roster Template and begin tracking their status.

Resources

Resource	Type
Advisory Board Roster Template (2.1.a)	**Evidence template**
ADT Meeting Agenda – Advisory Board	Supporting resource
Advisory Board Partner Recruitment Activity	Supporting resource
Introduction to Advisory Boards (video)	Supporting resource

Phase 2: Kick Off & Form the Board

Strategic action	2.1.a Recruit Advisory Board Members
Typical timing	October–December (Q4)
Lead	Academy lead and board chair(s)

Goal: Introduce the advisory board to potential partners, invite members to join, and confirm the board chair(s).

Action steps

1. Talk with your NAF Portfolio Manager about your kickoff meeting plans.
2. Plan the agenda, then invite prospects from your priority outreach list to a kickoff meeting.
3. At the kickoff, introduce NAF and the academy, explain the board's purpose, and share the Partner Interest Survey.
4. Review survey responses and send invitations to join the board, outlining the benefits and responsibilities of membership.
5. Confirm the chair or co-chairs with the principal.
6. Create a member contact list and a shared document folder.
7. Share the Advisory Board Orientation Series (Part 1, Part 2, Part 3) with members as they confirm.
8. Update the Advisory Board Roster Template as members confirm. Aim for at least 10 members, with at least 80% from business, industry, government, alumni, community, and postsecondary education.

Resources

Resource	Type
Advisory Board Roster Template (2.1.a)	**Evidence template**
Partner Interest Survey	Supporting resource
Advisory Board Invitation Flyer	Supporting resource
Invitation to Join the Advisory Board Template	Supporting resource
NAF Advisory Board Overview	Supporting resource
Guide to Recruiting Partners	Supporting resource
Recruiting New Advisory Board Partners	Supporting resource
Advisory Board Orientation Series (Part 1, Part 2, Part 3) (videos)	Supporting resource

Phase 3: Structure the Board

Strategic actions	2.1.c Establish By-Laws, 2.2.a Support for Student Learning, 2.3.a Advocacy & Sustainability
Typical timing	January–March (Q1)
Lead	Board chair(s) and academy lead, with all members

Goal: Set how the board will operate and plan how members will support students and sustain the academy.

Action steps

1. Hold regular board meetings. New boards meet at least monthly, except during summer months.
2. Confirm officer roles, such as secretary, treasurer, and advisory board interns, and form committees (for example, WBL, membership, and fundraising).
3. Customize the Advisory Board By-Laws Template, review it with members, and adopt it by a vote of the board.
4. Plan how members will support student learning, including the Outcomes-Driven Work-Based Learning (ODWBL) experiences in your Launch Year WBL Plan & Calendar, classroom activities, curriculum input, and professional learning for staff.
5. Plan how members will promote the academy, raise funds for paid internships and WBL, and recruit new partners.
6. Ask every member to complete a SWOT analysis (strengths, weaknesses, opportunities, threats) to prepare for the strategic planning meeting in Phase 4.

Resources

Resource	Type
Advisory Board By-Laws Template (2.1.c)	**Evidence template**
Advisory Board Support for Student Learning Template (2.2.a)	**Evidence template**
Advisory Board Advocacy & Sustainability Template (2.3.a)	**Evidence template**
Launch Year WBL Plan & Calendar Template (4.1.a)	**Evidence template**
Preparing a SWOT Analysis for Your Advisory Board	Supporting resource
WBL Activity Definitions	Supporting resource
ODWBL Overview for Advisory Board Members	Supporting resource
ODWBL Overview (video)	Supporting resource
Future Ready Skills Overview	Supporting resource

Phase 4: Plan for Launch

Strategic action	2.1.b Develop a Strategic Plan
Typical timing	April–May 31 (Q2); evidence due by May 31
Lead	Board chair(s) and academy lead

Goal: Hold the board's first strategic planning meeting and set clear outcomes for launch year.

The by-laws call for a strategic planning meeting before each academic year, including before the academy's first year. A new board won't have student or WBL data yet, so base the plan on school, district, and labor market data, academy goals, and the SWOT results.

Action steps

1. Hold the strategic planning meeting using the Strategic Planning Meeting Agenda.
2. Review the SWOT results and available data, then choose 3–4 focus areas, such as building membership, launching WBL, and raising awareness of the academy.
3. Complete the Advisory Board Strategic Plan Template with a goal, annual outcome, and action steps for each focus area.
4. Confirm board meeting dates and committee leads for launch year.
5. Recognize members for their work during the Year of Planning.
6. Confirm that 2.1.a, 2.1.b, 2.1.c, 2.2.a, and 2.3.a evidence is complete, approved by the academy lead, and uploaded by May 31.

Resources

Resource	Type
Advisory Board Strategic Plan Template (2.1.b)	**Evidence template**
Strategic Planning Meeting Agenda	Supporting resource
Tips for Recognizing Advisory Board Members	Supporting resource

Phase 5: Sustain & Grow

Strategic actions	2.1.a–2.3.a (annual review)
Typical timing	Launch year and every year after
Lead	Board chair(s) and academy lead, with all members

Goal: Keep the board active, growing, and focused on academy data each year.

Open academies submit evidence for 2.1–2.3 only when working toward Model+. Otherwise, use the templates in this phase as planning tools.

Action steps

1. Meet at least monthly (except summer) during the academy's first four years, then at least quarterly.
2. Orient new members with the Advisory Board Orientation Series (Part 1, Part 2, Part 3) and a review of the by-laws' membership requirements.
3. Update the WBL Plan & Calendar Spreadsheet each year, track WBL participation in the NAF WBL Tracker, and share results with the board.
4. Each spring, have members complete a SWOT analysis and hold the annual strategic planning meeting before the new school year.
5. Update the strategic plan each year with new outcomes informed by academy data.
6. Review the by-laws at least once a year and update the roster as members join or leave.
7. Recruit new members and partners to replace departing members and fill skill gaps.
8. Recognize members' contributions, and consider sending members to NAF Next.
9. Keep the Advisory Board Impact Dashboard current and share it with members and partners.

Resources

Resource	Type
Advisory Board Roster Template (2.1.a)	**Evidence template**
Advisory Board Strategic Plan Template (2.1.b)	**Evidence template**
Advisory Board By-Laws Template (2.1.c)	**Evidence template**
WBL Plan & Calendar Spreadsheet	**Evidence example for 2.2.a (Model+)**
Strategic Planning Meeting Agenda	Supporting resource
Advisory Board Orientation Series (Part 1, Part 2, Part 3) (videos)	Supporting resource
Tips for Recognizing Advisory Board Members	Supporting resource
Become a NAF Advisory Board Member	Supporting resource

Measuring Progress

Use the criteria section at the end of each evidence template to check progress. Add any unmet item to the academy's action plan.

Strategic action	Criteria to meet
2.1.a Recruit Advisory Board Members	At least 10 members; at least 80% from business, industry, government, alumni, community, and postsecondary education
2.1.b Develop a Strategic Plan	Clear annual outcomes for the plan year, informed by academy data
2.1.c Establish By-Laws	By-laws customized, adopted by a board vote, and reviewed within the past year
2.2.a Support for Student Learning	Members' support for WBL, classroom learning, curriculum, and professional learning is documented
2.3.a Advocacy & Sustainability	Members' plans to promote, fund, and sustain the academy are documented

Resource List

Evidence templates (complete and upload)

Template	Strategic action	Phase
Advisory Board Roster Template	2.1.a	1, 2, 5
Advisory Board Strategic Plan Template	2.1.b	4, 5
Advisory Board By-Laws Template	2.1.c	3, 5
Advisory Board Support for Student Learning Template	2.2.a	3
Advisory Board Advocacy & Sustainability Template	2.3.a	3
Launch Year WBL Plan & Calendar Template	4.1.a	3
WBL Plan & Calendar Spreadsheet	2.2.a (Model+)	5

Supporting resources (use to plan; do not upload)

Resource	Phase
ADT Meeting Agenda – Advisory Board	1
Advisory Board Partner Recruitment Activity	1
Introduction to Advisory Boards (video)	1
Partner Interest Survey	2
Advisory Board Invitation Flyer	2
Invitation to Join the Advisory Board Template	2
NAF Advisory Board Overview	2
Guide to Recruiting Partners	2
Recruiting New Advisory Board Partners	2

Resource	Phase
Advisory Board Orientation Series (Part 1, Part 2, Part 3) (videos)	2, 5
Preparing a SWOT Analysis for Your Advisory Board	3
WBL Activity Definitions	3
ODWBL Overview for Advisory Board Members	3
ODWBL Overview (video)	3
Future Ready Skills Overview	3
Strategic Planning Meeting Agenda	4, 5
Tips for Recognizing Advisory Board Members	4, 5

More Advisory Board Resources

Use these optional resources to go deeper on any phase.

Resource	Topic
Advisory Board Insights & Recommendations	Understanding advisory boards
Benefits of Partnering with a NAF Academy	Recruitment & engagement
How to Map Business Partners	Recruitment & engagement
Securing Quality Internships Best Practices	Recruitment & engagement
Fundraising & Grant Resources	Recruitment & engagement
How to Operate an Effective Advisory Board	Meetings & operations
Advisory Board Meeting Agenda	Meetings & operations
How to Manage Virtual Advisory Board Meetings	Meetings & operations
Outcomes-Driven WBL	WBL for partners
6 Future Ready Skills	WBL for partners
Engage in WBL	WBL for partners