

## Advisory Board Planning Template

Purpose/Objective: What is your “WHY”? Why are you proposing an advisory board at this time?

What is your vision for this advisory board? What do you hope to achieve? (list top 3-5 objectives)

What sector or industry are you targeting? Or do you envision a generalized advisory board (representatives from multiple sectors and industries)?

Who can you work with at your institution to bring this to fruition?

Who can you work with from your network? (ie. Employers, community partners, industry organizations, unions, government partners): *Tip: Think about what each partner can bring to the table related to the mission/vision stated above and exclude partners that will not make tangible contributions.*

Do you have a champion or anchor member(s)? (Someone who will help you bring other partners to the table, i.e. someone with a broad network or a good standing with key partners)

What expectations do you have of the advisory board members?

What are you willing to promise advisory board members? (i.e. starting meetings on time, limiting communication to 1-2x per quarter, etc)

Additional Questions:

- Who will chair/co-chair the Advisory Board? (Responsibilities include identifying partners, inviting partners, scheduling meetings, creating agendas, assigning note-taking role, sending follow up notes, creating zoom invitation, etc)
- What is the format of the meeting? (in person, virtual, hybrid?)
- Who will facilitate the meeting?
- How often will you hold meetings?