Champions Advisory Board Training
Planning for a Successful Year with your School’s Advisory Board

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Planning for a Successful Year with your School’s Advisory Board

■ Goals for Today
  – Define the primary responsibilities of both Principal and Chair as relate to the Advisory Board
  – Identify possible priorities for your Advisory Board
  – Discuss the framework for projects undertaken by other Advisory Boards

■ Goals for Future Webinars
  – Deep dives into event planning, marketing, and financial statement analysis
Primary Leadership Roles on the Advisory Board

**Principal**
- Identify priorities / goals for school which the rest of board can support with either time, funds, or skills
- Serve as the educational & instructional expert on the board
- Report at board meetings on key initiatives going on at school
- Provide necessary information to Chair to complete projects

**Chair**
- Plan & execute projects with other board members which meet principal’s goals
- Identify & obtain the resources which are necessary to meet goals
- Be an ambassador for school with donors
- Work with principal to plan meeting agendas, including identifying a key discussion topic
- Make the ask of donors, framing the ask with the principal’s goals for the school
- Keeping board members on task and focused on productive projects / discussions
- Recruiting & orienting new board members
Resources Advisory Board members could provide

- Financial statement and budget analysis
- Legal / contract review
- Marketing
- Graphic design
- Web / SEO
- Grant writing
- Event planning
- Project management
- Connections with local businesses, professional schools, extracurriculars, and potential Board members/advocates of the school
- Time to volunteer at school (ie cover the office on Touring Tuesdays)

The challenge: use these skills to support school goals, without spending too much time managing the board and board projects
Priorities for Advisory Boards - Examples

- Support enrollment initiatives with marketing
- Support educational quality by funding and/or obtaining access to new programs
- Bring transparency to financials to meet donor requests

Principal and Chair define the goals & plan meeting agendas accordingly
Advisory Board Projects - Examples

- Support enrollment initiatives by creating and maintaining marketing materials (print and web)
- Support educational quality by enhancing extracurricular opportunities
- Support enrollment with capital improvements to lobby, gym, cafeteria, and main offices
- Bring transparency to financials, and project budgets out 5 years
- Develop donor marketing materials, and manage outreach to potential donors and alumni
- Provide general support via fundraising, including annual giving to fund board-directed activities and hosting fundraising events
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