

***There has been so many helpful resources developed on forming and managing program / pathway industry Advisory Panels that you should never invest time in developing original materials.***

***All of your efforts should focus on effective (and if you have the vision and energy, creative) implementation.***

Forming and operating advisory panels are required for Perkins. Managed properly, they are an invaluable source of information, support, intellectual property, and physical resources.

Advisory panels are so valuable . . . *and so ubiquitous* . . . that every imaginable resource necessary to form and manage an advisory panel already exists.

To help you find whatever resource you need, the Academy has curated these resources for you to use:

<b>Best Practices: Resources for Forming and Managing Advisory Panels</b>		
<b>LCTCS Advisory Committee Handbook</b>	<b>05-02</b>	Developed in 2017, this handbook provides a comprehensive overview of how to form and manage the industry advisory committees required by Perkins. <i>One effective way to use this handbook is to go to the first page of every section and read the <b>Section at a Glance</b> box to review the content included in that subject area.</i>
<b>Perkins California Manual</b>	<b>05-03</b>	This manual has the virtue of being <i>short</i> – best example of eoe we could find. This manual is also in Word, so it’s easier for you to cut and paste any text you’ll want to repurpose.
<b>Colorado Advisory Committee Handbook</b>	<b>05-04</b>	Of the many advisory manual handbooks we reviewed, this was perhaps the most comprehensive and user-friendly. <i>One great feature: in-document links to all manner of useful artifacts you can use (go to page 43 of the document, which has page number 41 at the bottom).</i>
<b>Excerpts from Arizona Manual</b>	<b>05-05</b>	We included three simple and appealing appreciation resources from the Arizona handbook. <i>We’re certain you can take these and make them even better.</i>
<b>Who Knows?</b>	<b>05-06</b>	We downloaded so many of these resources we lost track. We forget which manual this excerpt was from, but we’ve included some useful resources here to repurpose.
<b>Weese Wisdom</b>	<b>05-07</b>	Finally, to show you how it’s done in Louisiana, please find notes from the address by Gary Weese about his award-winning automotive program in Bossier Parish.
<b><i>Remember: what they call “plagiarism” in school is considered “sharing best practices” in industry.</i></b>		

Many of you will find that you like resources included in one or more of these handbooks / manuals, but you’ll be frustrated that the documents are pdfs (which you can’t simply download and customize).

***Therefore, the Academy urges you to create resources for forming and managing advisory panels in whatever Office program makes sense, and then share those documents with the universe of prospective users on the Academy’s website.***

### Six Rules for Forming / Managing Advisory Panels

For those who like guidance, here are some non-traditional insights on forming and managing advisory panels.

Rule 1: It's all about "intelligent elbow grease" – the best, most useful and rewarding (for members) advisory panels are formed by the most persistent, energetic and creative CTE leaders. There is no substitute for effort.

But making the effort to create an effective advisory panel is necessary, but not sufficient for true excellence.

Attached please find the "Weese Wisdom" notes from our initial in-person session, with the practical, creative thoughts about forming an advisory panel highlighted in red text. Yep: that Gary's not only a looker, he's pretty persistent, energetic, creative and intelligent. We know his advisory panel is a national best practice. So be smart yourself, and follow his guidance.

Rule 2: Never create an original resource from scratch, but always continuously improve your resources – use

more inviting language to engage industry experts, and always an economy of expression. Figure out new ways to acknowledge advisory panel members. Engage students with the panels. *Be "derivatively original."*

Rule 3: Keep meeting minutes short – a lawyer on a non-profit board once taught us: *Keep minutes short. "eoe" big time.* If you need more detailed notes to follow up on one or more initiatives that's great. But don't burden everyone with a detailed narrative of the meeting they just attended. They'll love you for your concise minutes.

Rule 4: Offer clear, reasonable expectations on time commitments and level of engagement – honesty is always the best policy, and transparency is the hallmark of great leadership. If you're going to ask industry experts to serve on your advisory panels, *make sure* you give them an accurate indication of the time they'll need to dedicate to the panel, *and then make sure this expectation is realized in reality.*

The fact is: some panel members will be more engaged than others. If you'd like, you can create different levels of expectation, based on different levels of engagement.

One good idea might be: *reward those panel members who make the commitment to dedicate a higher level of engagement with the type of recognition device we're using to highlight superior performance by both our students and our teachers (i.e., posters, social media, recognition awards, named awards for students, etc.).*

Rule 5: Share everything that can be shared – let others use resources you develop, and don't hesitate to use their resources. Use virtual meeting technologies to make interim meetings more time-efficient for your industry partners. If you're a small / remote district, think about sharing advisory panels when / where that makes sense. Share everything that can possibly be shared.

Rule 6: Every year highlight something new that your panel has helped your students and teachers achieve – set the goal that every year, your industry panel(s) will discuss, develop and/or implement something new and wonderful for your school / district. Create that goal . . . and then achieve that goal. Celebrate (and communicate) the innovations and victories that your panel inspires.

### Six Rules for Forming / Managing Advisory Panels

- 1) It's all about "intelligent elbow grease" (like Gary Weese)
- 2) *Never* create an original resource from scratch, but *always* continuously improve your resources
- 3) Keep meeting minutes short
- 4) Offer clear, reasonable expectations on time commitments and level of engagement
- 5) Share everything that can be shared
- 6) Every year, highlight something new that your panel has helped your students and teachers achieve

### Ten Step Process for Forming an Advisory Panel

<b>1</b>	Work with REDO to determine areas of need	Consult with local REDOs and review state and regional workforce and economic development data to determine what panel(s) you'll need to form. <i>Remember: Perkins requires a program advisory panel.</i>
<b>2</b>	Appoint an internal leader	Appoint a teacher, counselor or administrator as the lead on every panel. <i>The enthusiasm of this leader will be the greatest factor in the success of the panel.</i>
<b>3</b>	Create the panel's objectives and annual calendar	Assign the internal leader the task of creating panel objectives for the first year, as well as the calendar of communications and events. Review the calendar with the REDO and other CTE leaders to confirm it is appropriate and "doable."
<b>4</b>	Create the panel's document infrastructure	Using samples from the resources provided, develop the required document infrastructure: 1) charter and bylaws; 2) agendas; 3) member list; 4) committee setup checklist; 5) letter templates; 6) recognition certificate templates; others. (See samples in resources provided)
<b>5</b>	Develop a "target list" for panel members	Develop a priority list of the industry experts you'd like to form on each panel you're forming. Determine if there are "must have" organizations that need to be represented. Agree with your REDO on this priority list of members, and on the optimal size for the panel.
<b>6</b>	Develop and send an invitation letter; follow up	Create an invitation letter which is engaging and optimistic. Indicate the level of engagement and required time commitments. Indicate your gratitude for service, and the transformative impact serving on the panel will have on students. Follow up.
<b>7</b>	Send a congratulations letter to members	Create and send a congratulatory letter to those individuals who agree to serve. Reiterate in the letter the transformative impact their service will have for students, teachers and schools. Provide a schedule of upcoming meetings and describe meeting objectives.
<b>8</b>	Send first meeting notice / agenda	No later than 45 days prior to the first meeting send to all members (and interested stakeholders) a meeting notice with an agenda that specifies meeting objectives.
<b>9</b>	Arrange for meeting logistics	Arrange for the meeting room, a/v, light refreshments (if offered) and any third-party involvement (e.g., welcome speech by superintendent / principal, entertainment by student groups, etc.). <i>It's always smart to "rehearse" the first meeting prior to "going live."</i>
<b>10</b>	Hold the meeting	Hold the meeting. Be gracious and appreciative. Document the conclusions reached by the panel. Refer back to the meeting objectives to confirm that you've achieved what you've set out to do (or understand why you could achieve your goals). Take notes for minutes.
For additional details, see any of the Advisory Panel handbooks / manuals provided		



## CTE Leadership Academy Guidance for Forming / Managing Advisory Panels



Downloaded Resources to Help with Forming / Managing Advisory Panels from [www.LACTELeaders.com](http://www.LACTELeaders.com)

[links tbd]