



Tip Sheet: Managing Advisory Boards in Seamless WBL

Advisory boards are an essential component of a strong work-based learning program; you can manage yours in Seamless WBL's Advisory Board area.

Creating an advisory board

To create your board, click the Add Advisory Board button at the top right of the screen. You'll get a screen where you can name your board, set it to Active status, and then add members. You'll find two drop-down menus at the bottom. Under the first, Select Board Member Name, you'll find a listing of people from your My

Advisory Boards - Advisory Board Members

The screenshot shows the 'Advisory Boards Details' page in Seamless WBL. The page title is 'Advisory Boards Details' and the status is 'Active'. The board name is 'Skilled Trades'. Below the board details is a table of 'Advisory Board members'.

Name	Organization	Email Address	Phone Number	Co-Lead	End of Term	Type	Assign Role
Bill Riley	Plumb Good	BR@PlumbGood.com	410-740-2223		05/24/2022	Parent	Board Member
Brett Pawlowski	Smith High School	brett2@nc3t.com	410-740-2006	<input type="checkbox"/>	05/31/2022	Secondary Administrator	Board Member
Dave Nelson	Johnson City Construction	Dave@JCConstruction.com	410-733-7333		04/08/2022	Employer	Treasurer
Emily Moore	Plumb Good	EM@PlumbGood.com	410-740-2222		06/03/2022	Employer	Board Member
Ignacio Cortez	JC Masonry	lggy@Masonry.com	410-740-9987		05/31/2022	Employer	Chair
James Johnson	BizTech Technology	SeamlessWBL@Gmail.com	704-662-2234		07/01/2022	Employer	Board Member
John Jameson	HVAC 4U	jameson@HVAC4U.com	410-999-1313		04/19/2022	Community Member	Chair
Tasha Brooks	NC3T	ttadom@nc3t.com		<input type="checkbox"/>	05/31/2022	Secondary Educator	Non-voting Member
Testy McTestface	Smith High School	Tester@test.com	555-555-5555	<input type="checkbox"/>	06/30/2022	Secondary Educator	Board Member

At the bottom of the page, there are two drop-down menus: 'Select Board Member Name' and 'Select School/Educator Board Member Name'. A 'SAVE' button is located at the bottom right of the page.

Partners area to select from; under the second, Select School/Educator Board Member Name, you'll find a list of educators as well as school and district administrators from your school in Seamless. Here, you can add both to your board.

Once you've selected one or more board members, you'll just need to set the expiration dates on their terms, the types of members they represent, and their roles on the board. Then click Save at the bottom of the page. As current partners listed in Seamless WBL, your board members will have already been invited to log in to the system, and will now have access to the advisory board to which you have added them.

Note that you can add multiple boards in Seamless. You can also delete boards using the trash can icon to the right of their names, but it may be better to set them to Inactive if you want to keep historic documents for boards that no longer function. You can also delete individual members from your boards with the trash can icon to the right of their names within the board listings. (You may have to scroll over to see this.)

You can also invite others from your school to serve as a Co-Lead of the board using the checkbox in the Co-Lead column. They will be able to: add/remove/edit members, set meetings, create and managing subcommittees, and add or remove documents from the Board Documents section. These Co-Leads will be able to access these functions from their own Advisory Board areas.

Advisory Boards - Advisory Board Members

Edit Board Activity

Dashboard > Advisory Boards > Edit Board Activity

Switch To Administrator Dashboard | Help | Brett

Schedule Details

Title: 2020-21 Kickoff Board Meeting | Date: 10/01/2020 | Time: 8:00 AM To 9:00 AM | Type Of Activity: Board Meeting

Role: Board Member | EXPORT SIGN-IN SHEET

Member Name	Invite	Attendance	Status
Bill Riley	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Pending
Dave Nelson	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Pending
Emily Moore	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Pending
Ignacio Cortez	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Pending
John Jameson	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Pending
James Johnson	<input type="checkbox"/>	<input type="checkbox"/>	
Brett Pawlowski	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Pending
Testy McTestface	<input type="checkbox"/>	<input type="checkbox"/>	
Tasha Brooks	<input type="checkbox"/>	<input type="checkbox"/>	

Location Name: Smith High | Address: 123 Smith High Lane | City: Johnson City | State: Tennessee

Zip: 32339 | Status: Active

Agenda: [Select File] | Attach Documents: [Select File] | Minutes: [Select File] | Sign-In Sheets: [Select File]

View Agenda Document | View Attach documents | View Minutes Document

Delete | CANCEL | SAVE | SAVE & SEND

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Subcommittees

In the Subcommittees tab, you can add subcommittees to your advisory boards. To do this, simply go to the Subcommittees tab within your Advisory Board page and click the Add Subcommittees; the following screen looks, and works, just like the main Advisory Board page. You can add anyone from your My Partners area, or your fellow educators, to the Subcommittee following the same steps you followed on your primary board.

From the Go to the Board Activity tab, you can also set up meetings for your Subcommittee members by clicking on the “Add Board Activity” Button. Next, under Type of Activity, select Subcommittee Meeting. A new field will appear titled Select Subcommittee that will list your current Subcommittees The options in the Role field will also change to Subcommittee Members and Subcommittee Chair.

Setting an advisory board meeting

Once you have your board members set up you can create meetings either by clicking Add Board Activity at the top right of the main screen for your board or by clicking the Board Activity tab and selecting the button from there. (The Board Activity tab allows you to see all past and future meetings as well.)

Once you create a new Board Activity, simply enter the required information. You will be asked for a name for the meeting, date/time/location, type of meeting, and who you want to invite (You can select these members based on their role from a drop-down menu or you can select those you want to invite by clicking on the box next to their name). You have the option at the bottom of the page to identify login details as well as any other notes you would like to add to the activity., You can also attach an Agenda as well as any other documents you want sent out prior to the meeting. When done, you can click Save to save the activity without sending, or Save and Send to send an invitation to the members you selected.

Once you click Send to Members, your advisory board members will receive an email invitation to the meeting; this email will include details on the activity, any documents you’ve added to the record, an option to Accept or Decline the invitation, and an option to add the meeting to their calendars.

Prior to the meeting, you can create a sign-in sheet using the Export Sign-In Sheet button near the top of the page. Once the meeting has been held, you can re-enter the record to upload your Minutes and Sign-in Sheets so they’ll be easily accessible whenever you need them for state audits or Perkins compliance. You can also mark the people who attended so that you can run attendance reports in the future.

Board Documents

You and your board members can see a list of all documents shared during past meetings, as well as those marked for future meetings. Once you’ve clicked into your Advisory Board, go to Board Documents to see a list of uploaded documents and to upload additional documents to share. You can also add general documents not associated with a particular meeting.

What Your Board Members See

Partners and educators who belong to your board will be able to see information through their respective portals. They will be able to see the following details on every meeting: Contact lists, date/time/location and posted documents. They can also RSVP through the portal if they wish. In addition, they’ll have access to the Board Documents library so they can see all the documents that have been posted to this board, including any meeting-specific materials and general documents such as bylaws and job descriptions.