

“Moving Your Advisory Council from *Good to Great*”

A Teleconference Training for Assistive
Technology Act Programs

Welcome!

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Goals of This Session

- Learn latest research and best practices in building and maintaining advisory councils
- Promote new ways of engaging and energizing advisory councils
- Interact with other state leaders who seek to improve advisory council effectiveness
- Identify areas for possible further training needed to strengthen the councils

Ground Rules

- Focus on learning with and from each other.
- Be open in sharing with peers without fear of judgment.
- Stay curious; then move toward solutions.
- Use specific examples whenever possible.
- Identify yourself each time before speaking.
- Wait for speaker to finish before you speak.
- Have someone handle anything that might otherwise interrupt you while you're on the call.



Agenda

1. Welcome; introductions; housekeeping
2. Overview of advisory councils -- common purposes and pitfalls
3. Best practices in *recruitment* of members
Q & A, discussion; What's worked for you?
4. Best practices in *retention* of members
5. Best practices in *engaging & energizing*
Q & A, discussion; What's worked for you?
6. Reflection, next steps & wrap up

4



Governing boards are	Advisory councils are
<ul style="list-style-type: none"> ■ required by statute to discharge legal and ethical responsibilities that cannot be delegated 	<ul style="list-style-type: none"> ■ sometimes mandated by government, sometimes established at discretion of organization
<ul style="list-style-type: none"> ■ typically governing incorporated entities 	<ul style="list-style-type: none"> ■ typically subgroups of incorporated entities, reporting to governing boards or CEO
<ul style="list-style-type: none"> ■ made up of members who are legally charged with overall accountability 	<ul style="list-style-type: none"> ■ made up of members who typically serve as advisors to supplement work of board, staff or others
<ul style="list-style-type: none"> ■ accountable to multiple stakeholders including the public interest 	<ul style="list-style-type: none"> ■ made up of members who are accountable to the organization they advise, external agencies that authorize the AC, or other parties as specified
<ul style="list-style-type: none"> ■ decision-making bodies 	<ul style="list-style-type: none"> ■ advisory bodies

Advisory Councils: Common Traits

An advisory council is a voluntary collection of individuals assembled to supplement the governance activities carried out by boards or the management tasks carried out by staff.

Adapted from BoardSource, 2004

Typically, they do:

- Advise and recommend

Typically, they don't:

- Govern with legal accountability

Advisory Councils:

Where Is Yours on the Continuum of Involvement?

LOW

HIGH



AC "on paper" only

Act like staff

Advisory Councils: Variety of Functions

They can...

1. Provide specialized expertise that may be missing from board or staff
2. Serve as ambassadors, building bridges into the community
3. Survey the need for enhancing existing activities
4. Bring in resources
5. Conduct evaluation and oversight activities
6. Help maintain accountability or meet demands of external constituents
7. Bring in outside support and expertise, linking the program to everything from grassroots community concerns to celebrities and potential funders

Advisory Councils: What about Yours?

Which best describe the top 3 functions of your
Advisory Council?

1. _____
2. _____
3. _____

Other? _____

Advisory Councils: Some Common Pitfalls

1. Lack of clarity of purpose, role, or scope
2. Lack of awareness of or commitment to overall mission
3. Unclear expectations of individual members
4. Lack of leadership, support from key staff
5. Improper or inappropriate composition
6. Haphazard recruitment process
7. Lack of clarity, interaction with the governing or appointing authority
8. Underutilizing of individual members
9. Advisory Council overstepping its role
10. Absence of orientation, continuing education
11. Other?

Recruiting Process

1. Establish a nominating committee or task force of committed, influential leaders.
2. Define and document expectations of AC members
3. Analyze current advisory council and define recruitment needs keeping in mind statute requirements and other desirable characteristics (see grid tool)
4. Plan the recruiting and selection process
5. Recruit, interview and select candidates
6. Orient and involve the new member
7. Evaluate the process

Sample Recruitment Grid

	2006					2007				
	Members					Members				
Gender										
Age										
Ethnicity										
Geography (inner city, suburban, rural)										
Sector (business, government, community)										
SKILLS:										
Public Relations										
Financial										
Legal										
Program / Product Expertise										



Why People Join Advisory Councils

- Commitment to mission
- Desire to contribute to the cause without the legal responsibility
- Inspired by a dynamic leader
- Interest in building skills
- Interest in networking
- Other?

Recruitment: What's Worked for You?



Retention of Members: Orientation and Involvement

- Orientation
 - To program history, services, clients, etc.
 - To other members, structure and processes
 - Try buddy or mentor system
- Get new AC members involved right away
 - Committee or task force
 - Attending and/or assisting with an event
 - Provide adequate staff support
 - Design meaningful meetings

Retention of Members: Relationship and Education

- Personal calls, visits with AC chair or program director
- Time to socialize with other members
- Involve in program demonstrations, activities, or other ways of learning from/with staff
- Bring in speaker or occasional other learning opportunity on topic chosen by AC

Engaging and Energizing

- Meetings: Lively, dynamic, focused on strategy, include learning.
 - Orient around strategic plan or initiatives.
 - Swap stories that show program's success.
 - New items each time (Role play the Ask. Test your financial IQ. Bring in "experts.")
- Packets out ahead of meetings.
- At least 75% attendance.
- Evaluate periodically.

Engaging and Energizing: Dealing with Troublesome Members

- Not dealing with it is not an option if behavior discourages others
- Term limits
- Finding the best way to involve member
- Offering member to support program in another way
- Other?

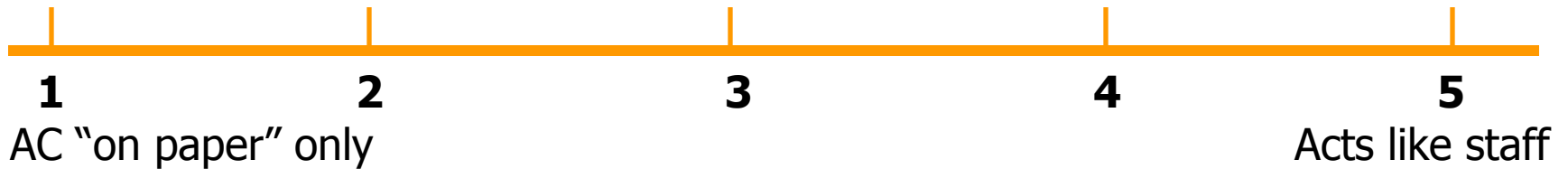
Retention, Engaging and Energizing: What's Worked for You?



Advisory Councils: Where Would Yours Be if it Moved from *Good to Great?*

LOW

HIGH



Reflections on Learning

What Would it Take to Move Your Advisory Committee from *Good to Great*?

Top Take-Aways

1. ...
2. ...
3. ...

What Further Learning or Resources Are Needed?

1.

2.

3.

Further Questions?

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