MRC

Mentoring Resource Center

FACT SHEET

In This Issue . . .

A well-constructed advisory group—whether you call it a board, committee, or council—with a clear mission can make all the difference in achieving your program's goals. *Building an Effective Advisory Committee* explains how to organize and use this essential part of your mentoring program to maximum effect.

The Pub Hub (beginning on page 4) takes a look at resources available from the MRC Lending Library that can be useful to your mentoring program, including resources on advisory groups, asset building, and risk management.

Building an Effective Advisory Committee

A strong and effective advisory group can be a tremendous asset to both new and well-established youth mentoring programs. But starting and maintaining one often takes a back seat to the more pressing needs of day-to-day program operations, such as volunteer recruitment and quality mentor training. U.S. Department of Education mentoring grantees who included the development of an advisory committee in their grant applications are now faced with the reality of getting this group up and running. Busy project coordinators may be unsure what the purpose of the group should be and why it's important.

This fact sheet offers an overview of the benefits of a well-functioning advisory committee and outlines steps mentoring program staff can take to make their advisory committee effective and useful.

Board of Directors and Advisory Groups: What's the Difference?

All nonprofit organizations are required to have a governing body, usually a board of directors, that is responsible for the overall well-being of the agency. Boards hire, fire, and evaluate the executive director; establish the agency's vision, mission, and values; set strategic direction and monitor progress, and ensure the fiscal health of the agency. Board members take on specific tasks on behalf of the agency from time to time, but in general they are not involved in the day-to-day implementation of services.

Many nonprofits also create one or more advisory groups that can provide support and guidance to both the board and staff. Advisory groups are usually more flexible in what roles they take on than most boards of directors. They do not have fiscal oversight and are not ultimately responsible for the health and well-being of the agency, but they often take an active role in helping the agency implement its goals and objectives.

What's in a name?

Naming your advisory group may not seem like a first priority, but the name you select will define it, both internally and to the general public. Although this fact sheet uses the term "advisory committee," there are many alternatives that may be more accurate for your own group: board, council, task force, or a unique name created by your organization. Keep in mind that the term "board" implies a certain level of authority your group may not have, and be sure to emphasize the "advisory" function in all materials. Get approval from your governing body before finalizing what you will call your advisory group.

Reasons for Forming an Advisory Committee

Some advisory committees are formed by a board of directors to work on a specific issue or challenge. Such working groups may serve only until the specific issue is resolved, at which point recommendations are made to board and staff, and the group dissolves. However, organizations often see the benefit of establishing a permanent advisory board or committee to provide ongoing support (see sidebar: "What's in a name?"). Such groups can, for example:

- Provide guidance that helps staff solve day-to-day problems

- Offer a forum for program stakeholders—school and community partners, business supporters, youth, parents, government workers, volunteers—to communicate their opinions, share their expertise, and coordinate services

- Act as a link between program operations and the board through a member who serves on both groups

- Support and represent the interests of a program within a larger agency, such as a mentoring program operating within a multi-purpose social service organization

Advisory committees may be particularly helpful to U.S. Department of Education school-based mentoring programs that are part of a larger organizational structure, such as a school district, multi-purpose agency, or faith-based institution. Mentoring may not be the primary mission of such an organization, and its management staff and board might have only limited knowledge of what the mentoring program is all about. In these settings, an advisory committee comprising key individuals who are truly interested in mentoring can offer guidance to staff, help them achieve their program's specific goals, and represent the mentoring program in the community.

Even agencies whose primary mission is mentoring can benefit from having an advisory committee in addition to their board of directors. An advisory committee provides a structure for involvement by a variety of community members who can offer invaluable support in such areas as recruitment, fundraising, and marketing. Members may offer advice on program policy or services, provide valuable connections with local businesses or agencies, help plan and staff events, or provide support to busy staff. In short, advisory committees offer an organized way to engage volunteers in strengthening mentoring programs.

Steps for Developing an Effective Advisory Committee

1. Establish the purpose of the group. To build the membership of your advisory committee, you will first need to develop or clarify its purpose and scope. For example, an advisory committee whose first priority will be to increase partnership collaboration and communication will likely have different membership than one whose primary purpose is to organize match activities or raise additional funds for special events. If the

advisory committee's purpose is not clearly defined in your grant, refer to the section earlier in this article for common reasons for forming an advisory committee. The following questions may also help you define your group's purpose and structure:

- Do you want an advisory committee that can advocate for your program and increase its visibility, both internally and externally?

- Do you want a working committee that can take on specific tasks to support your activities, or an advisory group that can provide informed input as you plan new activities or develop policies and procedures?

- Do you need the advisory committee as a structure for keeping partners engaged and community members informed, or would it be most helpful to have a small group of people with specific skills and connections that can help you get things done?

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An advisory group is a collection of individuals who bring unique knowledge and skills which complement the knowledge and skills of the formal board members. . . .
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— Carter McNamara
Authenticity Consulting

☞ Before moving forward, obtain approval from your board of directors or other governing body to establish the advisory committee for the purpose you have identified. Make a brief presentation to the board and ask for advice on recruiting members and facilitating communication between the advisory group and the board.

☞ Check with the appropriate person in your agency to determine if the advisory board is—or should be—covered by your board of directors' liability insurance.

- What decisions can this group make? Will your board of directors need to approve any actions the group wants to take? How will the advisory committee communicate with the board of directors?

- Who will staff the advisory committee? Are any funds available to provide such basics as refreshments at meetings?

2. Recruit members that fit with the group's purpose. As you begin to develop the advisory committee's membership, it will be natural to turn first to people you already know, or those who have already expressed interest in being involved. This base of supporters is a good start, but you will soon need to think more strategically about whom you want to serve on your committee and the skills they will need. Examples of potential members might include:

- Current or former mentors

- Representatives of partner organizations

- School counselors, principals, teachers, or other school staff

- Representatives from key community-based organizations that serve youth

- Child and youth advocates in your community

- Representation from your community's cultural, racial, and ethnic minorities

- Parents of youth served

- Youth (former mentees, high school mentors, etc.)

Other criteria for membership may include diversity of opinions and experience, and a balance of cultural, racial, age, and gender representation.

The skills you look for as you build your committee depend on its purpose. If it is primarily to raise funds,

The Pub Hub

A Look at Publications and Tools You Can Use!

As the feature article in this issue illustrates, the governance provided by a formal advisory committee or board of directors is critical to the long-term success of a mentoring program. In addition to the many useful online resources mentioned on page 7, the MRC Lending Library offers a number of print resources that can help your program create or improve advisory committees and boards.

Our most recent addition comes from BoardSource, a leader in the field of nonprofit governance that has produced many useful resources:
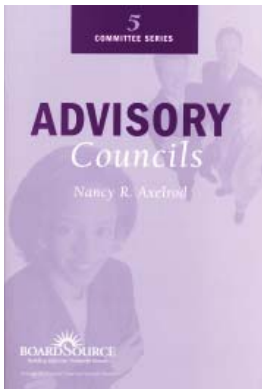
■ *Advisory Councils* by Nancy R. Axelrod. 2004, BoardSource.

This handy 36-page guide covers many of the basics of creating and implementing an advisory council. The author differentiates these councils from formal Boards, and explores important topics such as choosing the right members, structuring the group and its work, and handling common conflicts and challenges.

Lending Library link: http://www.nwrel.org/resource/singleresource.asp?id=17678&DB=res

Other titles in the library from BoardSource include:

■ *The Governance Series*. 2004, BoardSource.

This set of nine brief handbooks covers many of the responsibilities and structures of a formal board of directors, and will provide useful advice for any nonprofit hoping to improve the functioning and usefulness of its governance team. Specific titles in the series, each of which can be borrowed separately from the collection, are:

- *Ten Basic Responsibilities of Nonprofit Boards*
- *Financial Responsibilities of Nonprofit Boards*
- *Structures and Practices of Nonprofit Boards*
- *Fundraising Responsibilities of Nonprofit Boards*
- *Legal Responsibilities of Nonprofit Boards*
- *The Nonprofit Board's Role in Setting and Advancing the Mission*
- *The Nonprofit Board's Role in Planning and Evaluation*
- *How to Help Your Board Govern More and Manage Less*
- *Leadership Roles in Nonprofit Governance*

■ *Nonprofit Board Answer Book: Practical Guide for Board Members and Chief Executives*, by Robert Andringa. 2001, BoardSource.

This classic resource offers a wealth of advice for board members and agency leaders. Written in an easy-to-use question-and-answer format, specific chapters of this resource cover board functions, board structures and processes, board and committee meetings, and board-staff relations.

Lending Library link: http://www.nwrel.org/resource/singleresource.asp?id=15110&DB=res

■ *The Policy Sampler: A Resource for Nonprofit Boards* by Kathleen Fletcher. 2000, BoardSource.

This helpful resource offers a number of sample policies and texts on topics such as risk management, confidentiality, conflicts of interest, grievances, compensation, and roles and responsibilities of board members. It's a great tool for any program looking to solidify its board through the creation of formal policies, procedures, and guiding language (even if it does show its age by providing electronic versions of these policies on a *floppy disc*!).

Lending Library link: http://www.nwrel.org/resource/singleresource.asp?id=15113&DB=res

Other resources of interest in the MRC Library
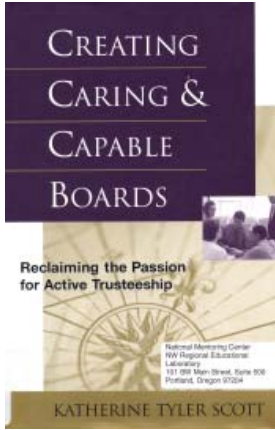
Creating Caring & Capable Boards by Katherine Tyler Scott. 2000, Jossey-Bass.

This resource comes at board roles and responsibilities from a different perspective, going beyond administrative and fiduciary responsibilities to imagine boards as mission-driven organizational leaders. It offers advice on trusteeship and organizational understanding, and provides self-assessment tools and activities that can help implement these organizational leadership principles.

Lending Library link: http://www.nwrel.org/resource/singleresource.asp?id=15111&DB=res

*Secrets of Successful Boards* edited by Carol Weisman. 1998, F.E. Robbins & Sons.

This practical guide offers chapters written by non-profit leaders themselves, on topics such as tips for effective board meetings, structuring the board for maximum results, and integrating new members into fundraising and other development activities.

Lending Library link: http://www.nwrel.org/resource/singleresource.asp?id=16198&DB=res

The Board Members Book: Making a Difference in Voluntary Organizations by Brian O'Connell. 2003, Foundation Center.

This thorough resource covers a lot of territory—everything from board-staff interaction to fundraising to ethical accountability. While the bulk of the book focuses on the roles and actions of board members, the Appendix expands the content even further by offering tips for troubled organizations and listing traits of organizations that are models of excellence.

Lending Library link: http://www.nwrel.org/resource/singleresource.asp?id=15112&DB=res
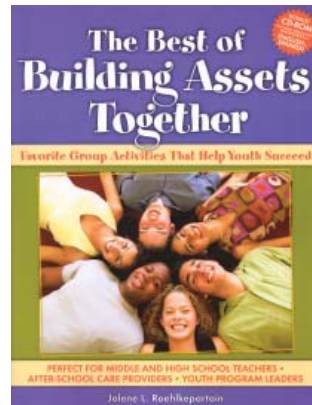
The Best of Building Assets Together: Favorite Group Activities That Help Youth Succeed by Jolene L. Roehlkepartain. 2008, Search Institute.

This is a gold mine for programs looking for group activities to do with mentees. It offers 166 ready-to-use activities for building developmental assets, raising self-awareness, building personal skills, developing leadership, strengthening relationships, improving communication, enhancing character, and more. Activity handouts are provided on a CD-ROM. Each activity is tied to one of the 40 Developmental Assets and can be mixed and matched to create a set of activities that speak to your program's unique mission and goals.

Lending Library link: http://www.nwrel.org/resource/singleresource.asp?id=17679&DB=res
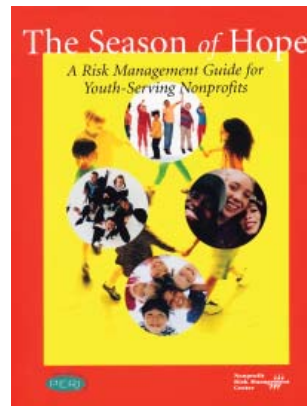
The Season of Hope: A Risk Management Guide for Youth-Serving Nonprofits by John C. Patterson and Barbara Oliver. 2004, Nonprofit Risk Management Center.

This resource offers practical advice for managing all types of risks in youth-serving programs. Beginning with a risk management overview, the book quickly moves into topics such as involving parents in risk management, youth-on-youth violence, injuries and accidents, and keeping young people safe online.

Lending Library link: http://www.nwrel.org/resource/singleresource.asp?id=17680&DB=res

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These and other resources are available through the MRC Lending Library at: http://www.edmentoring.org/lending_library.html. Please contact library coordinators Michael Garringer (garringm@nwrel) or Kay Logan (logank@nwrel.org) if you have questions about searching or using the collection.

look for members with grantwriting, event management, business, or marketing skills. If you need members to articulate your mission, skills in public speaking or journalism might be helpful. If you need help with program policy and procedures, skills in management and attention to detail will be important. In addition, all members should be able to communicate well, listen and learn, and provide constructive advice. Above all, they should be enthusiastic about mentoring and have a genuine interest in helping you with your mission.

As you recruit members, ask for suggestions from other staff members, your board of directors, partner agencies, and others. Develop a simple written application that gathers basic information about the person's skills, interests, and motivations. This will help you track the mix of skills and representation that will be effective in carrying out the group's mission. Once your group is established, have participants determine policies and procedures for recruiting and selecting new members.

3. Build your team and develop structure. Once you have selected the core group, begin developing teamwork and a sense of ownership. Your first meeting is likely to be devoted to getting acquainted and learning about the mentoring program. But it is a good idea to start working on a specific task as soon as possible to more fully engage members. One necessary task is the development of the committee's basic operating procedures: whether there will be officers, how often the group will meet, meeting structure and guidelines, term of service, and so on. Even if some of these have been set up in advance, the group should review them and suggest improvements.

4. Prepare members for their role and the work they will do for your program. Once members have become acquainted and have established some basic operating guidelines, they will be eager to take on the work they were recruited to do. Before determining exactly what that work should be, they need to understand what your program is all about and what their mission and level of involvement will be. Prepare them by:

- **Providing a thorough orientation to your program.** Describe long-term goals and objectives, current activities, and any successes or challenges. Include information about the young people you serve, partnerships, and other program basics. Give enough back-

ground so that members will understand how the program works and can offer suggestions that make sense. Be sure to provide information in writing to review and refer to later.

- **Reviewing the advisory committee's mission.** If committee members were not involved in creating the mission, they should review it and see if it reflects why they are there. It should be something they all feel reflectives what they want to be. Let them know in advance if there are any requirements dictated by your funding source that limit changing the mission.

- **Clarifying the extent and limits of authority.** An advisory committee can make recommendations or give opinions but in most cases has no true decision-making authority. Make sure that members know what decisions they can make on their own, how their advice is used, and how final decisions are made in the agency. Develop a communication link between the board of directors and the advisory committee so that your group sees that their work is recognized and taken seriously.

5. Empower the group to develop a clear scope of work. Advisory committee members may look to staff for direction on what their specific role should be and what activities they will be involved with, but in order for them to be fully invested they need to develop their own work plan based on the information you provide. Walk them through a planning process that might look like this:

- Facilitate a conversation about which program areas would benefit from the group's support, such as volunteer recruitment and training, fundraising, or community awareness.

- Discuss which of the identified areas need support right now and which could wait or need little support. Ask them to pick one or two areas for immediate action and one or two as a long-term goal. Allowing them to establish these priorities will help ensure their commitment, but it's your job to make sure the priorities they set are realistic and fill a real program need.

- Have the group establish measurable objectives and specific activities for the areas they

have agreed to work on. For example, if expanding the volunteer pool is their first priority, the group might have an objective of increasing the number of businesses that encourage their employees to be mentors. To accomplish this objective, they each agree to contact five businesses over the next three months and report on the results.

- Identify a lead person for each area of involvement the committee plans to take on so program staff don't have to do all the work of encouraging people to follow through on agreed-upon tasks.

Tips for Maintaining Your Advisory Committee

An advisory committee is like any other part of your program: it needs ongoing nurturing, maintenance, and an occasional dose of new energy. Here are a few tips to keep your advisory committee running smoothly:

- Encourage committee members to take the lead, but make sure their goals are realistic and compatible with your program's mission. Don't let them take on activities that are more work than they can handle or that require more staff time than you can provide.

- Establish and maintain a structure that works for everyone. At a minimum, this should include regular meetings, a chair or co-chair who can be your primary contact person, and a way to record the group's work.

- Seek out new members and provide a thorough orientation for those who join. Involve your current membership in recruiting and orienting new members.

- Provide regular updates about your program and let members know how their work has helped you progress toward your goals.

- Ask for opinions or involvement only when it fits with the group's mission and role as advisors. Be sure members understand what you want from them when you involve them in a decision or in planning a new program.

- Thank members regularly in many different ways—in person, in handwritten notes, via e-mail, in your newsletter—for the work they are doing.

The bottom line is that an advisory committee needs a sense of purpose, doable tasks, a timeline, praise and recognition, and a belief that its input is valued. Advisory committee members need regular guidance from you to be sure they are staying on task. With a little work, your advisory committee can be a real asset to enhancing and sustaining your program.

Online Resources on Advisory Groups

The Free Management Library provides easy-to-access resources regarding the leadership and management of individuals, groups, and organizations. The section on advisory boards discusses the purpose of advisory boards, when and how to form them, and the relationship between the advisory board and board of directors.

http://www.managementhelp.org/boards/advisory.htm

Energize, Inc. is an international training, consulting, and publishing firm specializing in volunteerism. A good discussion of advisory groups is available on their Web site

http://www.energizeinc.com/art/npadvis.html.

"What is a board and why should we have one?" This excellent article on advisory boards appeared in the October 2002 issue of *Board Café*, the online newsletter of Compass Point Nonprofit Services. Included is a sample letter of invitation to potential members.

https://www.compasspoint.org/boardcafe/details.php?id=41

See the Pub Hub (page 4 and 5) for additional resources on boards and advisory committees available for loan from the MRC Lending Library.

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An Advisory Board is composed of people with a genuine interest in your work and a desire to see it do well. Your Advisory Board members serve as a sounding board, offering ideas and expertise and giving you honest advice. More than anyone else, [they] will be on your side. They will be people with no axe to grind who want to listen to you and advise you. Above all, they'll want to contribute to your organization's well-being.

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— Susan Ward, "Your Guide to Small Business: Canada"
http://sbinfocanada.about.com/od/management/qt/advisoryboard.htm

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