

“Advisors? Ambassadors? Or Askers?”

By Patricia S. Morris, MPA, CFRE, Senior Counsel

We are often asked for our opinion about advisory boards, “Should we have one?” The answer isn’t as simple as one might expect, because the real question isn’t about whether or not a nonprofit organization should have an advisory board, but what would they do?

The initial question usually comes into being when leaders have identified someone they want for their governing board but are doubtful that the individual would be willing to serve in that capacity. Their thinking about an advisory board is that it is a group that doesn’t have to do anything but lend their name and reputation to the letterhead, hence giving the organization greater credibility. And, while that might help in some measure, our question is whether or not that thinking will actually provide any long-term benefit for the organization’s mission.

An advisory board, by the mere use of that name, suggests that all the members have to do is to give the “big board” advice, then be on their merry way. And heaven forbid if you don’t follow their sage advice – that’s the fastest way to losing them and any benefit they may bring to the table. After all, you’ve called it a “board” and that says they are part of the governing structure, right?

In reality, what most organizations need is people who will tell their story far and wide, open doors to new prospects, and help them raise money. So, what can you do with a group of people who are willing to help, but in a less intense way than sitting on a governing board?

First and foremost, a name other than “board” is best, to distinguish in no uncertain terms their role from the governing board. “Council” is a great substitute, as is “Assembly,” “Cabinet,” “Committee,” “Alliance,” “Circle,” “Advocates,” or “Caucus.” I can picture the vigorous debate of a group of marketing wordsmiths around the table connecting words like these to the organization’s mission. That’s a meeting I’d love to attend because it gets to the heart of the real purpose – what do we need to move our mission and from whom?

Questions to Ask

The planning discussion about to institute or not to institute a special group might go something like this:

Q: What do you want them to do?

A: Connect you to the public and more specifically, to people who will embrace and give to your cause. A group of volunteers - hopefully with a few high profile people – whose name AND energy will connect your mission to others.

Q: Why not just ask the high profile people to sit on one of your board committees as a non-board volunteer?

A: One or more of your desired people might spend the time interacting with board members, doing the work of the committee but not having the duties of the board. This not only helps them share their wisdom with board members, but it might actually lead them to join your board at some point in the future. Even if they aren't ever interested in going further up the hierarchy, you're involving them where they can make the greatest impact.

Q: If you still think you need a special group, how often would you assemble this group and how would you use them?

A: Meetings that happen too often will feel too much like a regular board or committee meeting and you want this group to feel special. Gathering them only once or twice a year around a meal is usually sufficient. In between meetings, one-on-one visits or phone calls will keep the individual engaged if there is real substance to the discussions. People who are well known in the community can tell the difference from being used in a productive way and just simply being used. If you need their investment advice, for instance, then make sure you have a real investment question before you call them. You can keep them updated on the organization's progress, of course. That's good cultivation and they'll recognize and appreciate it. But don't waste their time with superficial matters – pick their brains about something critical to the mission. Their opinions should be from perspectives that you don't already have on the board so that they offer additional help. They will know that as well.

Q: How many do we need for this group?

A: As many as it takes to get the work done that you've identified as the purpose for their being. The great thing about a work group like this is that it's not by-law specific. Just remember that the group needs to be managed – and this kind of group doesn't want to interact with the Development Director, but with the CEO. Think about them like you think of major donors – because in fact they are, or will be if you do it right.

Q: Should we have a job description for this group?

A: Yes, without a doubt there should be a job description for this and all groups of volunteers, including the governing board. After all, recruiting people to help your organization should include your expectations in writing so that there are no misunderstandings from the beginning. Setting goals, determining criteria for membership, as well as all of the other normal work that come with committees is just as valuable for a President's Council as for any other official body of volunteers. In fact, it's even more important because you want to ensure that your high-profile members know that you know what you're doing and where you're going. Knowing that, they will figure out how they can help you best and will guide you with sincerity. Follow their lead and the relationship will be easier to sustain.

The Bottom Line

Before you jump on the advisory board bandwagon, do your homework with your staff and board committees. Ask the right questions and discuss the answers to determine what you need in the way of additional players at the table.

- Do you really need more advice? Or do you need more money?
- Do you just want to use an individual's name? Or do you want them to get engaged with your organization so they can influence their friends?
- Do you want yet another committee to manage? Or will this new group of people bring tangible benefits that will affect the outcomes for which you and your hardworking team are striving?

The answer may surprise you.