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Yes or no, why or why not?

## **Advisory boards and other bodies**

### **Are you really sure you want one?**

Do you have an advisory board? Do you wish you didn't?

Do you want some kind of community council to engage people?

Do you need a place to put those special people who don't want to be on your board? Or how about people you don't want on your board but you need to put them someplace?

Are you desperately hoping to get more people to help you raise money? Do you want important people to put on your letterhead, hoping that will help you raise money? (By the way, actually, having actual people actually help you raise money would be better.)

Okay. Stop right now. Don't invent anything yet. Don't set up some group or thing. Take a deep breath. Think carefully. Be real clear about what you want to accomplish and how best to do that.

Too often we leap to the answer without thinking carefully.

I bet you don't really want an advisory board or community council or group of volunteers or whatever. I bet what you want is to raise more money.

Or you want to get good advice from wise people. And with little thought, you figure a community council is a good idea. Or you want to show key people that you involve other key people. So let's invent a group. Maybe put them on the letterhead.

Or maybe you want something else entirely.

My point is: Don't pick an answer before you figure out what you're trying to accomplish. Don't pick an answer before you've identified all the challenges and opportunities from various possible answers.

Let's talk candidly – like I always do in this column!

The board of directors, that required corporate entity

First, let's look at one group you already have: the board of directors. Do you love having a board of directors? Do you revel in the challenges of working with a group? Managing group dynamics. Helping the group understand what are group decisions and what are the expectations of the individual members of the group? Stopping the board

and its individuals from micromanaging. Knowing enough about governance to help the board do governance.

Well, you have to have a board. And despite all the hassles, a board does important stuff. You know, that corporate governance stuff. (Please make sure your board is doing corporate governance. Too many people in the nonprofit sector don't know what that means!)

You have to have a board. But do you want to have another group? Are you sure that some group is the right answer to whatever you are trying to achieve? Stop leaping to the answer without thinking more carefully about the question.

Here's another thought: Do you like training volunteers – whether board members or service volunteers or fundraising volunteers or...? Do you like following up with them and making sure they do the right stuff the right way? How about firing them? Because sometime some volunteer (including a board member) will have to be fired.

Notice the awkward construction of that sentence. I did not say "Sometime you'll have to fire a volunteer, including a board member." You might not be the person who does the firing. You certainly won't be the terminator of a board member if you're a staff person. But you might be the person who has to explain to the terminator that terminating has to happen. And you might have to train the terminator how to terminate.

Here's yet another thought: So you have to have the board. And you have to manage and enable it to do the right stuff in the right way. (Read my previous columns about enabling. I find enabling to be a weak link in too many nonprofits. Too few staff really knows how to enable the board and its members to do governance. And too few staff knows how to enable volunteers to participate in fundraising.)

Anyway...you have to have a board. But you don't, necessarily, have to have other groups. Do you really want another group to manage and coordinate and engage and... Do you?

### A group or individuals – there's a difference

Okay. I've still got more thoughts: Is whatever you want to accomplish best accomplished through a group of people? Or is what you want accomplished better done with individuals?

The primary point of a group is to bring people together to talk, explore, argue, disagree, offer insights and learn together to produce meaningful results and impact. That's what a good board does. That's what effective board committees do.

On the other hand, maybe you want assorted individuals carrying out individual tasks on your organizations' behalf. And there isn't really much of a purpose for a group so much to think about. So much to figure out before you invent anything.

As an executive director or fundraiser, I want to talk with lots of different people. I want to engage different people in different ways.

For example: When I was the chief development officer at Trinity Repertory Company, I wanted individuals to help make personal solicitation calls every single year. With 500 individual and corporate prospects, I needed about 75 volunteers. I recruited 10 team captains and they each recruited 7 volunteers.

The solicitors solicited. Everyone met once together, to select prospects and talk about key messages. Then the solicitors went off to do their work. There was follow-up

and reporting and blah blah blah. You know the drill. But the bottom line: They were individuals doing a task.

I managed individuals doing individual work. I was not managing a group and helping to create meaning for that group. And having conversations with that group and garnering their thoughts and advice and. Oh wow. Happily, I was not doing all that work.

Another example: I expect executive directors to reach out and chat with lots of different people in the community. Meet with the mayor to talk about stuff. Reach out to that smart business owner for her insights. Pick the brain of the young entrepreneur.

Whatever. Whomever. Whenever. Individuals talking with you about your organization. This isn't a group. Why would you want a group? Why do you need a label and a format?

### But sometimes a group is exactly the right answer

Yes, indeed. Sometimes a group is exactly the right answer. But not until you've asked the right questions and explored the challenges and opportunities.

Consider, for example, these questions:

1. What are you trying to accomplish? For example: What is the problem you are trying to solve? What opportunity are you trying to exploit?
2. What do you need to help you accomplish that which you are trying to accomplish?
3. What is the concept of a group and how might a group help? What would be the nature of the group work?
4. What is the concept of an individual(s) doing task(s)? What would be the nature of this work?
5. What are the challenges and opportunities to design, facilitate, and manage a group? Do we have the capability (skills) and capacity (time, human resources, etc.) to serve the group well – and have the group serve us well? Does a group add sufficient value to justify the investment? Or, should we design a process and systems to engage individuals to do tasks?

### **Tips for using groups – but only when you are very darn sure that a group is the best possible response for what you want to accomplish!**

Okey dokey. Here we are. Ready to talk about that group you want to start. You've answered all the questions at least once. Then you thought some more. And then you answered the questions again.

You are really, really sure that a group will add value...As opposed to using individuals. You are positive that you have the capacity and capability to make the group work.

So here goes: my assorted thoughts, theories, and advice.

But first, a mini dedication: To all the development officers at MSU.

That's Michigan State University to all you readers – in case you thought there was some other MSU! I grew up in East Lansing, Michigan, home of Michigan State University. My dad was a professor there. I graduated with my BA and MA from MSU. And 10% of my estate goes to MSU.

I was presenting at the AFP Michigan Capital Area Chapter in early March. I sat next to Doug Miller, Director of Development at MSU's Wharton Center. Doug asked me what I think of fundraising advisory groups for the various colleges.

Here goes: for you, Doug, and your MSU colleagues. Thanks for the idea.

First, if you establish a group, you have to define assorted elements. And these elements have to be written – and approved by the appropriate entity, e.g., the CEO or the board or...

You use these written guidelines and policies to define membership. And you use these written materials to screen, qualify, and recruit members to the group.

So what are your answers to these questions?

1. What's the purpose of the group? What's the group's intended role?
2. What's the scope of work for the group?
3. Given the group's purpose and scope of work, what kind of individuals do you want to recruit for membership? Consider skills, expertise, and experience. Consider networks and connections. And, definitely use a diversity lens. What are the performance expectations for the members of the group?
4. What kind of support will you provide to the group and to the individual members of the group?
5. How frequently will the group meet? How will those meetings happen? (Remember, the point of a group is to meet and talk!)
6. What (if anything) will you do with non-performing members of the group? (For example, the best boards remove non-performing board members. This standard is necessary because the board is the legal corporate entity accountable for the health and effectiveness of the corporation. And because governance only happens when the board is together, board member attendance and participation in conversation is essential.)

Another thought: Never ever call a group an "advisory board." There is only one board: the corporate governing board. Some organizations then establish an advisory body and call it the advisory board.

In my experience, that's confusing. People are generally not sufficiently knowledgeable about the scope of authority and accountability of corporate governance to effectively distinguish between the "real" board and the "advisory" board.

Even those who've served on lots of boards lots of times don't necessarily understand governance, including the distinction between the board and its members. (And if you're confused, visit the Free Download Library on my website. And read my NPQ columns and Simone Uncensored blogs about governance.)

So I choose to use the term "board" only for the corporate governing board. To call something an "advisory board" is simply too confusing. If I feel that the organization will benefit from a group of people, I use the term "advisory council" or "community council."

### Special groups for fundraising

How about fundraising and special groups?

Sometimes organizations set up a special group – outside the board – to help with fundraising. Sometimes some organizations set up a separate corporation that raises and holds money. And then gives it to the operating entity.

There are valid reasons for choosing that actual corporate structure, or advisory structure. But, assigning the raising of money because the board can't do it or doesn't want to do it... That's not acceptable. That's unacceptable!

The board is ultimately accountable for the health and effectiveness of the corporation. And the board should not absolve itself of that accountability by delegating to another entity.

Sure. Right. I'm gonna serve on the special group that raises money. And the board gets to spend it. And the board members don't have any responsibility to help fundraise.

Bad idea. Inappropriate idea.

Think about fundraising in a big institution like a university with all those different colleges or departments. Think about fundraising in a big institution with different geographic locations. Think about a capital campaign that wants to reach out to diverse audiences.

For a university, maybe a fundraising committee for the College of Arts and Letters, and the Business School, and the Museum, and more... is a good idea. I think, yes. And each of those separate fundraising committees (or whatever you want to call them ... but don't use the "board" word) is involved – to some degree – with strategy and tactics, relationship building and solicitation, connecting with networks, etc.

I remember a capital campaign for the San Francisco library years ago. The library set up fundraising committees for different audiences, e.g., gays and lesbians, the Chinese community, etc. Years ago, institutions realized that women give differently than men... different motivations and approaches. Fundraisers realized that different cultures give differently. So an organization might develop different fundraising committees for different audiences.

Go for it. Makes sense to me.

Just make sure that you answer all those questions I posed earlier. And, keep in mind the following:

- You have to clearly communicate the distinctions between the committee's role and scope of authority and the role and scope of authority of the governing board.
- You have to effectively enable the committee and its members to understand their limits of authority.
- Of course, you have to respect, honor, and recognize the work of these groups and their members. And make sure that the official "powers that be" respect, honor, and recognize the groups and members, too.

More importantly, you have to empower the groups you establish. And you have to empower the members of your groups. You have to give them voice and a meaningful level of responsibility and authority. Otherwise why would they want to play with you?

From a fundraising perspective, you have to ensure that your board listens to these groups. I don't mean that the groups meet with the board. But your groups need to know that their commitment and work, experience and expertise are valued by the board and understood by the board.

Your fundraising committees and their members will glean insights and have important observations. Otherwise why would you have recruited these particular individuals? Make sure that your board and staff leadership (including the CEO and other key staff, deans, for example) hear (and maybe learn from!) the insights and observations of these committees and their members.

From a fundraising perspective, you have to ensure that the board and its individual members also have a role in fundraising. Your groups need to know that board members give and also help fundraise. Your board and its members cannot merely sit on high and expect others to do this work.

So those are my thoughts today. What do you think?