

DETERMINING THE SIZE OF YOUR ADVISORY COUNCIL

How large should *your* advisory council be? There is no magic number. It depends on what your goals are and what you are asking of your council. It also depends on whether you are relying on one council to meet several needs or you are creating multiple councils, each to meet a unique need.

A general consideration is that your council(s) should be small enough for every council member to play a significant role, yet large enough that you can get the work of the advisory council(s) done. Certainly, the smaller the group, the less likely that anyone will be able to shirk his/her responsibility. However, the larger the group, the more diversity of ideas and the better reach you have into the community. Both conditions are very valuable.

In deciding the number that is right for you, ask yourself the following questions:

- What talents do we require given the goals the advisory council has committed to accomplishing?
- To what degree will our organization benefit from diversity* on our advisory council?
- To what degree do we require “reach” into the community – the ability to tap different circles of influence for fund raising, advocacy and/or other purposes? If it’s important, how many networks do we want to tap into?
- Will the proposed number give us the needed range of talent, diversity and reach? Will it allow everyone the comfort level to speak up?
- Will we be able to do the work of the advisory council with the number we are considering, without creating burnout?
- Will we be able to engage everyone on the council in meaningful work?
- What are the pros of an advisory council of “X” size? What are the cons?
- Why do we believe this is the right number for us?
- Would an advisory council of a different size be seen as advantageous or detrimental in the greater community? Why?
- If our bylaws allow attendance of advisory council members at board meetings will we find that we have too many people at the meetings to make them productive?

* Consider defining diversity broadly – e.g., age, gender, geographic location, range of ability/disability, socio-economic level, learning style and religion, as well as race and ethnicity

WRITING JOB DESCRIPTIONS FOR ADVISORY COUNCIL MEMBERS

Write out the following:

1. The purpose of the advisory council
2. The organizational goal(s) advisory council members will be expected to help achieve
3. The expectations to which advisory council members will be held – e.g., attendance at a specified number of meetings and/or events, a financial contribution, hosting potential friends of the organization
4. The policies within which advisory council members will be expected to work – e.g., they will *not* speak for the organization except under narrowly defined circumstances or they may attend board meetings with voice but no vote
5. The individual/position to whom advisory council members will report
6. The qualifications advisory council members should have in order to carry out their responsibilities
 - Skills
 - Experience
 - Personality characteristics
 - Affluence
 - Influence
 - Other
7. The anticipated time commitment required of someone who accepts a slot on the advisory council
 - Number of hours per month/year for meetings and assignments
 - Attendance at organizational functions
 - Length of term
8. The support/perks advisory council members can expect from the organization to better ensure goal achievement
 - An orientation
 - Ongoing education such as mission moments
 - Community education opportunities
 - Access to resources
 - Other
9. The method and frequency of evaluation advisory council members can expect

CREATING AN ADVISORY COUNCIL RECRUITMENT PLAN

To recruit the "right" people you must take a strategic approach. Develop a plan by following the steps below and work the plan. While it will take time and energy, the result will be worth it.

- Determine the organization's overall needs in relationship to the realization of its vision – e.g., Does it need to build resources, make more friends for the organization?
- Define the core functions and specific jobs that must be undertaken to meet those needs – e.g., What must be the priorities and key activities of the advisory council?
- Define the skill sets, characteristics and connections required to successfully handle those functions/jobs. Consider here also the ideal composition of the council.
- Specify your expectations of those you will recruit to the council – e.g., passion for mission, a financial commitment, fundraising skills, expert knowledge of your issues
- Create job descriptions
- Brainstorm the types of people that might want to take on these jobs, where you would be most likely to find them (will you use a "blue ribbon committee"?¹) and how you can best connect with them
- Think about what you can offer people who agree to serve. Be sure you can answer the question, "Why is your organization worthy of their support?"
- Determine how you can cultivate these individuals so that they will be responsive to your invitation
- Consider how you will approach "the ask" to ensure that when one accepts a role on the council that he/she meets the responsibility at the level you require

¹ Thanks to Jan Masaoka for the concept of bringing together community leaders for a single meeting to suggest names of possible candidates.

SAMPLE COMMITMENT LETTER FOR ADVISORY COUNCIL MEMBERS

I, _____, agree to serve on the _____ Advisory Council.
As a member of the council, I hereby commit that I will:

1. Act in the best interests of the organization, carrying out my responsibilities in line with its vision, mission and values.
2. Ask questions and become knowledgeable about this organization's issues.
3. Prepare for, attend and actively participate in council meetings. I understand the advisory council meets (*How often*) for about (*How long*); that there may be additional special meetings; and any of these meetings may go beyond the scheduled timeframe. I understand I am expected to attend a minimum of ____ meetings per year.
4. Attend the orientation and other educational functions to which the advisory council is invited.
5. Give a personally meaningful gift.
6. Participate in (*Name of organization fund raisers*) at (*What*) level.
7. Hold confidential matters in confidence.
8. Be an active advocate for the organization.

I understand that my participation is not a one-way street, that the organization makes a number of commitments to me, including:

1. It will provide me with sufficient information to effectively carry out my responsibilities. Such information will include community and industry-wide issues.
2. It will provide me with opportunities to discuss the organization's programs, goals, activities, and status with key leadership. Additionally, I can request such opportunities.
3. It will respect my input.
4. It will not waste my time.
5. It will provide opportunities for professional and personal development.

I understand that the role of advisory council member is a critical one for this organization, and therefore that my failure to live up to these commitments will result in my removal from the council.

Signature

Print name

Date

30 TIPS FOR IMPROVING ADVISORY COUNCIL PRODUCTIVITY

1. Be clear about the council's purpose. What does it exist to accomplish?
2. Give considerable thought to who should sit on the council. Look beyond the "usual suspects." You will not only increase your chances of finding people with the specific skills you need, you may end up cultivating potential board members for the future.
3. Tell people why they were asked to sit on the council and what is expected of them. Include likely commitments of time, energy, skills, contacts and money.
4. Spend some time allowing council members to bond. People are more willing to participate and take on responsibility when they feel a commitment to the group.
5. As a group, state the problems or issues to be tackled. This way everyone starts on the same page.
6. Limit council discussions to topics that fit the organization's mission, vision, values and priorities.
7. Send out agendas and preparatory materials ahead of meetings so that people can come prepared to work.
8. Meet only when there is something substantial with which to deal. There is nothing sacred about monthly meetings.
9. Give people sufficient notice of meetings and try to avoid making last minute changes to the schedule.
10. Begin and end your meetings on time. People are far more likely to come if they feel you respect their calendar.
11. Provide a mission moment at each meeting.
12. Train council members to better do the job for which they were recruited and ensure all are approaching the task in a consistent manner.
13. Encourage council members to sign up for Google Alerts about your issue. It will keep them interested, involved and knowledgeable.
14. Assign tasks as evenly as possible. While it may be easier to ask the same handful of people that do everything, it guarantees that you limit participation, leadership development and potential productivity.
15. Set accountability measures and hold people to them.
16. Solicit then listen to everyone's input. After all, the value of councils is summed up in the adage "two heads are better than one."
17. Don't just accept comments at face value. Feed back the comments in your own language, applying your interpretation. Ask questions. Probe. Be sure you understand what is being said, and why it is being said.
18. Assume that even the most off-the-wall ideas make sense to the people who express them. Instead of rejecting such ideas out of hand, ask for clarification.
19. Don't fight over ownership of an idea. The important thing is that the idea is out there to potentially benefit the organization.
20. Speak only for yourself. Let others provide their own explanations or rationales.

30 TIPS FOR IMPROVING ADVISORY COUNCIL PRODUCTIVITY

21. Play the organizational skeptic. Always ask the group to consider the downside of a pending decision. When people feel they have thoroughly looked at all the potential negatives, they are more confident of any decisions to proceed.
22. Strive for consensus. While time consuming, it simplifies implementation and ensures commitment.
23. Bring conflict into the open.
24. Don't assume that silence means agreement in situations where decisions are being made.
25. If you can't reach consensus, consider:
 - a. Identifying shared interests and working to build on those.
 - b. Thinking up ways to make the most promising option better or more palatable.
 - c. Putting aside the solutions already on the table, restating the mission, vision, values and goals, and generating a new list of possible solutions that might also/better meet the organization's needs.
 - d. Initiating a trial period in which the strongest option is put to the test.
 - e. Changing the scope of the problem.
 - f. Agreeing to limit the decision to procedural items rather than substantive.
26. Stay focused on the goals and tasks of the council.
27. Keep action-oriented minutes
 - a. Record only resolutions and votes, not "he said...", "she said..."
 - b. Include sections such as *supplies to order*, *ideas to implement*, *people to call*.
 - c. Summarize with who will do what, by when.
28. Follow-up after the meeting.
 - a. Ask council members if they are comfortable with their decisions.
 - b. Set up a system to bring those who missed the meeting up to date.
 - c. Do what you promised to do at the meeting.
29. Prepare a report to the board. Include:
 - a. The council's recommendations.
 - b. The pros and cons of each recommendation.
 - c. The rationale for the recommendations made.
30. Send regular updates to council members so that they are always knowledgeable about the latest organizational news.

BENEFITS OF COMMUNITY SLEUTHING

Hildy Gottlieb, author and founder of Creating the Future, coined the term "community sleuthing" in her wonderful book "Friendraising: Community Engagement Strategies for Boards Who Hate Fundraising but Love Making Friends" (Renaissance Press, Tucson, AZ 2006). She believes this approach is one of the most powerful, energizing, productive and least-utilized that nonprofits have at their disposal. We agree!

Here are some of the ways community sleuthing can benefit your vision and the community you serve. As a result of the interviews you will undertake, you can:

1. **Expand your thinking about:**
 - The relevance of your mission in creating a better community
 - The importance of your vision
 - Ideas that will move the community forward
 - Potential collaborative partners
 - What others have to say about your value to the community
 - Whatever else is important and relevant to the work you are doing

2. **Have the opportunity for direct one-on-one connections with people who may be interested in your mission but may not yet be involved with you, those people you have always wished you could get in front of.**
 - Share the story of your impact in an intimate setting and hear how it resonates
 - Grow that first connection
 - Get referrals to others that can help move the community forward

3. **Learn how to frame your case for support in the most compelling way and ramp up fundraising capacity to better impact community needs**
 - Create a case for support that you *know* people and other organizations find compelling and inspiring
 - Make strategic decisions regarding future programs and fundraising campaigns
 - Avoid making critical mistakes
 - Build an army of supporters

COMMUNITY SLEUTHING: WHOM TO VISIT?

Having an intimate conversation with people who may have some interest in your mission but may not yet be connected to you or your community allies— people you have always wished you could get in front of — is one of the most powerful, energizing, productive and least utilized tools that nonprofits have at their disposal. Choosing the right people to meet is one of the most important first steps in your community sleuthing project. Whom do YOU want to meet?

People in the public sector

People in the private sector

Community leaders

Potential collaborative partners

Other people

With appreciation to Hildy Gottlieb www.creatingthefuture.org

COMMUNITY SLEUTHING: STEP-BY-STEP

Since you want to maximize your time with the key individuals you previously identified, you want to be strategic about how you undertake your community sleuthing.

Prior to the visit:

What key questions do you want answered about your organization's impact in the community?

Who will conduct the interviews?

Whom will you interview?

Who will secure the appointment? By when?

During the visit:

How will you open the conversation?

What will you especially listen for?

What will you be sure NOT to say or do?

What are the two things to be sure to get before you leave?

After the visit:

Who will do the formal thanking? By when?

How will you further engage this person?

What did you learn from your notes?

Did you ask for referrals?

How will you follow-up? (see "How Community Sleuthing Can Help Your Fund Development Program").

With appreciation to Hildy Gottlieb www.creatingthefuture.org

COMMUNITY SLEUTHING: QUESTIONS TO ASK

You also want to be sure that you have thought out the questions you will ask of these key individuals so that you cover all the bases you want to cover. Come up with a few questions in a couple or all of the following areas.

1. What your organization is doing to change the community for the better

2. The issue(s) your organization addresses and why it's important

3. The demand in the community for the sort of services you and your partners provide

4. How your programs integrate with others in the community

5. The other organizations you work with and why doing

6. Means for creating more impact

7. Being as effective as possible

8. Other issues or approaches

9. Referrals

10. Anything else?

With appreciation to Hildy Gottlieb www.creatingthefuture.org

COMMUNITY SLEUTHING: WHAT ADVISORY COUNCIL MEMBERS CAN DO

Interviewing a wide variety of individuals in your community concerning their opinions about your organization is one of the most powerful, energizing, productive and least utilized tools that nonprofits have at their disposal. Participating in this process is also an ideal role for an advocacy council member.

Planning/prior to the visit:

Visiting/interviewing:

After the visit:

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HOW COMMUNITY SLEUTHING CAN HELP YOUR PROGRAM CONTINUE ITS GOOD WORK

Your community sleuthing activities have introduced you to many people who can become supporters of the work your organization is doing while, at the same time, you learn more about their interests. Engaging these new friends may encourage them, in turn, to introduce your organization and your partners to people they know, while they continue to become more deeply involved with you themselves. Through these intimate conversations, you may also have uncovered some potential collaborative corporate and/or nonprofit partners that you had previously overlooked. You may also have gleaned information that will be helpful as you plan future initiatives.

Here are some ways you can use the results of your community sleuthing to build your programs.

1. Welcoming new friends
2. Holding follow-up/leadership briefings
3. Continuing to ask for opinions
4. Researching giving capacity
5. Improving your case for support
6. Planning for future campaigns

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SAMPLE FUNDRAISING COUNCIL MEMBER COMMITMENT SHEET

Name: _____

Date: _____

Thank you for your dedication to _____ and especially for your work to help raise awareness and funds for the organization. Please check the following activities to which you will commit during the year:

- _____ 1. Assist in making an appointment for staff with a major gifts prospect.
- _____ 2. Assist in the cultivation and/or solicitation of a major gifts prospect.
- _____ 3. Buy _____ ticket(s) or _____ table(s) for the _____.
- _____ 4. Secure _____ donated items for _____.
- _____ 5. Sponsor _____ for the _____.
- _____ 6. Add _____ new names to the mailing list.
- _____ 7. Send out _____ newsletters with a personal note to friends and colleagues who are not familiar with our organization, and provide those names and contact information to development staff.
- _____ 8. Make _____ thank-you calls to donors as requested by staff.
- _____ 9. Hold an organizational awareness event in my home, or hold another function to benefit the organization and build awareness.
- _____ 10. Make a gift to the Annual Giving Society of \$ _____.
- _____ 11. Make a gift to the Major Gift and/or Capital Campaign of \$ _____.
- _____ 12. Bring _____ prospect(s) for a tour of the organization.
- _____ 13. Suggest foundation(s) where I have a contact for possible grants.

SAMPLE FUNDRAISING COUNCIL MEMBER COMMITMENT SHEET

- ____ 14. Bring the CEO and/or development director to a community event as my guest(s) and make introductions all around.
- ____ 15. Include the organization in my estate plans.
- ____ 16. Attend a workshop or some other type of continuing education on fundraising.
- ____ 17. Help create or review gift acceptance and donor recognition policies.
- ____ 18. Join the speaker's bureau.
- ____ 19. Add the organization's website as a link to my signature information for email, and on my social media sites.
- ____ 20. Attend the annual board retreat, if invited.
- ____ 21. Be on the lookout all year long for potential advisory council members who could add value to our group.
- ____ 22. Learn how to advocate for our organization's mission on a political level.
- ____ 23. Serve on an event committee.
- ____ 24. Chair an event committee.
- ____ 25. Drive my friends, family and colleagues to the organization's website through social media – e.g., "liking" the organization on facebook, making comments, noting my affiliation on my LinkedIn page

Add your ideas for other action steps that are specific to your organization:

- ____ 26. _____
- ____ 27. _____
- ____ 28. _____

Signature

Thank you. Please return the completed form to: _____

BUILDING A STRONG COMMUNITY PRESENCE: CREATING THE PUBLIC DIALOG WITH KEY IDEAS AND KEY MESSAGES

*"Big money philanthropists are placing their bets on **key ideas** and becoming hands-on in their design and implementation."*

"The New Face of Philanthropy"
Business Week, Dec 2, 2002 (Cover Story)

KEY IDEAS KEEP LOYAL DONORS AND KEEP DONORS LOYAL!

KEY IDEAS strategically circulated to support the initiatives reflected in the development plan will:

- Fuel a fund-raising campaign and reenergize an organization.
- Position the organization as a leader instrumental in improving or changing the community in line with its mission.
- Help attract new stakeholders identified in the development plan.
- Broaden the opportunity for media exposure.
- Hold and grow loyal donors by keeping them well informed and engaged.

KEY MESSAGES:

- Create publicity that brands your identity with a strong coherent image.
- Reflect the relevant issues which are pertinent to the success of your mission.
- Cultivate supporters by explicitly communicating the organization's beliefs and its unique ability to successfully carry out its work.
- Specify the impact of your current and future role in the community.
- Reflect how you are most currently presenting yourself to the community.
- Differentiate you from your competition.
- Posture you as an expert and an authority on your issues.
- Showcase your skills and expertise.
- Educate your current and potential supporters, appropriate media outlets, elected officials and business leaders.

TIPS:

- Solicit constant feedback from your stakeholders. Realign your messages to reflect this feedback and stay on track with your key messages.
- Create a different dialog for different audiences.
- Find those spokespersons who can be the "face / voice" of the organization.

Resource: *Polishing the Diamond*, Joe Saxton

CREATING AN EFFECTIVE LIST OF TALKING POINTS

It is important that all advocates of your organization “speak with one voice.” One of the most useful tools in assuring that this is the case is to provide them with a list of talking points that reflect the essential information you want people to know about you. Organizational spokespersons can then choose a few points that resonate with them that they can easily remember and articulate to potential friends and supporters.

These questions may help you create your inspiring talking points list:

1. When and why was our organization created?
2. What is the main problem that we are trying to solve or the main opportunity we see?
3. Who is affected by the problem or opportunity, and how are they affected?
4. What are some compelling statistics related to our issue - international, national and local?
5. What is our track record in relation to these statistics?
6. What is one compelling story that clearly reflects how we change lives?
7. Of what one or two things is this organization most proud?
8. What makes us unique?
9. Why are we worthy of philanthropic support?
10. What are our organization’s values?
11. How do we engage the community as partners in achieving our vision?
12. What are two easy ways I can further engage the person to whom I am speaking with our organization?

SAMPLE ADVOCACY COUNCIL MEMBER COMMITMENT SHEET

Name: _____

Date: _____

Thank you for your dedication to _____ and especially for your work to help raise awareness for the organization. Please check the following activities to which you will commit during the year:

- _____ 1. Assist in making an appointment for staff with community leaders.
- _____ 2. Hold an organizational awareness event in my home, or hold another function to benefit the organization and build awareness.
- _____ 3. Send out _____ newsletters with a personal note to friends and colleagues who are not familiar with our organization, and provide those names and contact information to staff.
- _____ 4. Establish or enhance relationships with the media, offering the organization as a source for valuable information on its mission area.
- _____ 5. Establish or enhance relationships with legislators, offering the organization as a source for valuable information on its mission area.
- _____ 6. Serve as the organization's representative on a coalition.
- _____ 7. Bring _____ community leaders for a tour of the organization.
- _____ 8. Bring the CEO and/or community relations director to a community event as my guest(s) and make introductions all around.
- _____ 9. Join the speaker's bureau.
- _____ 10. Attend a workshop or some other type of continuing education on advocacy.
- _____ 11. Visit your state capitol or Washington DC as part of a legislative tour to bring attention to your organization and its issues.

SAMPLE ADVOCACY COUNCIL MEMBER COMMITMENT SHEET

- _____ 12. Add the organization's website as a link to my signature information for email, and on my social media sites.

- _____ 13. Drive my friends, family and colleagues to the organization's website through social media – e.g., "liking" the organization on facebook, making comments, noting my affiliation on my LinkedIn page

- _____ 14. Sign up for Google Alerts to stay abreast of the organization's issues.

- _____ 15. Attend conferences geared to the organization's issues.

- _____ 16. Help develop talking points for the organization, the members of your advisory council, the board and others.

- _____ 17. Attend the annual board retreat, if invited.

- _____ 18. Be on the lookout all year long for potential advisory council members who could add value to the group.

- _____ 19. Serve on a PR/marketing or public policy committee.

- _____ 20. Chair a PR/marketing or public policy committee.

- _____ 21. Participate in "Community Sleuthing."

- _____ 22. Other:

Add your ideas for other action steps that are specific to your organization:

- _____ 23. _____

- _____ 24. _____

- _____ 25. _____

Signature

Thank you. Please return the completed form to: _____