



# A GUIDE TO FORMING ADVISORY BOARDS FOR FAMILY-SERVING ORGANIZATIONS

A PARTNER IN  
**NCTSN**

The National Child  
Traumatic Stress Network



INSTITUTE FOR  
TRANSLATIONAL  
RESEARCH  
in Children's Mental Health

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## Introduction

There is no recipe for starting a successful advisory board. With such diverse types of organizations that work to improve the lives of children and families, it would be unrealistic for us to come up with a template that would work for any group.

However, in helping our partners set up advisory boards over the years, we have picked up certain lessons and noticed some common decision points. What follows is not a to-do list, but a list of things to think about as your organization considers how an advisory board might enhance the value you provide. The series of decisions and steps needed to form an advisory board can be daunting at the outset and we hope this tool can help simplify the process and free you up to think about the bigger strategic decisions that will form the bedrock for your board.

According to the National Child Traumatic Stress Network, one of the essential elements for a trauma-informed organization is to “build meaningful partnerships that create mutuality among children, families, caregivers, and professionals at an individual and organizational level.” A well-planned advisory board can help infuse a trauma-informed approach at every level of your organization.

*“Having the Advisory Board resource available for us has allowed for a more rich and well thought-out plan on how to include and promote the family and youth voice as a part of our grant. It has allowed our team to really discuss the ultimate purpose and questions that would be asked of an advisory board.”*

Angela M. Tunno, Ph.D.  
Licensed Clinical Psychologist  
Duke University Medical Center

*NOTE: Throughout this document we will be using the term “families” to refer to parents, caregivers, youth and young adults who have experienced trauma & have lived expertise.*

## WHY AN ADVISORY BOARD?

It’s a reasonable question: “What good does an advisory board do, and why should we prioritize resources towards one when there is so much to do?” It can sound like one more hoop to jump through.

In working with many organizations that harness the power of advisory boards, we have found several common benefits:

- » Providers and programs carry out their work more effectively when their work is informed by those with “lived experience” expertise.
- » Even when providers have the best of intentions, some families find the experience of working with a provider disempowering. Including families in the decisions of the organization can mitigate these unintended dynamics.
- » For organizations that develop interventions or treatment programs, direct feedback from families can improve your products.

### **SAMHSA’s 6 Principles of a Trauma-Informed Approach**

1. Safety
2. Trustworthiness and transparency
3. Peer support
4. Collaboration and mutuality
5. Empowerment, voice and choice
6. Cultural, historical, and gender issues

Learn more about each principle at [samhsa.gov](http://samhsa.gov) and [nctsn.org](http://nctsn.org)

# 1. WHAT ARE YOUR GOALS FOR THE BOARD?

Of course, it is important that your goals for your advisory board align with the goals for your organization. How will the advisory board help your organization achieve its mission? Common goals for an advisory board include:

- » Increase awareness of our program and attract families
- » Receive input on specific aspects of our program, such as our assessment process or selection of evidence based treatment models
- » Collect feedback about how people seeking services experience our organization
- » Infuse trauma-informed practices throughout our organization, shifting from delivering trauma informed treatments to being a trauma informed organization
- » Shape the strategic direction of the organization
- » Gather qualitative data on my evidence based treatment model and/or training practices

## Example goal: Quality Assurance

“To balance our academic, research-based perspective with the real-life experiences of families in order to improve our training materials and increase our credibility with learners”

*Center for Trauma Recovery and Juvenile Justice*

*NOTE: A clear, specific goal for you advisory board will make all of the following decisions easier. Do not advance beyond this step before you've agreed upon your goals.*



# 2. WHAT TYPE OF BOARD WILL YOU HAVE?

## BOARD WITH ONLY FAMILIES

### Typically used

When an organization needs more input from parents and/or children to increase understanding of how people are experiencing the services they deliver.

### Pros

- » Scheduling: You don't have to balance the schedules of families (who often prefer to meet in the evenings or on weekends) with providers (who often prefer to meet during the workday).
- » Family members may share more honest feelings and provide more constructive criticism about your services if providers are not present
- » Extends your work by offering families post-traumatic growth opportunities
- » Provides peer support

## Cons

- » There isn't a chance for providers and families to learn from each other
- » Missed opportunity to break down barriers to partnership, collaboration, and mutuality

## BOARD WITH BOTH FAMILIES AND PROVIDERS

### Typically used

When the organization seeks the wisdom of many different peoples' perspectives to order to solve problems, improve services and seek long-term sustainability. *This may increase the likelihood that organizations "leverage the collaborative advantage," one of the core values of NCTSN: that working in collaboration accomplishes more than working in isolation or competition.*

### Pros

- » Trains providers to partner with families, as opposed to acting as "rescuers," which may translate to their clinical work & improve their overall partnering skills
- » May extend the healing process for family members, offering an opportunity for post-traumatic growth. Many family partners have shared that the chance to "pay forward" their experiences and help another family has been something they highly valued and been part of their process to make meaning.
- » Demonstrates your commitment to sharing power with families and using a trauma lens in all aspects of programming

### Cons

- » Difficult to schedule: It is difficult for staff members to meet in the evening and difficult for families to meet during the workday
- » It can be difficult to create conditions of psychological safety. Providers may have trouble setting aside their "provider" role and acting as a colleague with families. Family members may be intimidated by not having the same professional experience or training as providers.
- » It takes more time to develop safety, board culture and shared partnerships, and therefore can take longer for Board to become productive

### Word of caution: Makeup of combined boards

In our experience, having one or two family partners serve on a board as the "voice" representing family members often backfires. These members might feel isolated in the role and may be hesitant to speak up. Many groups enjoying success with combined boards have designated an equal number of slots for those coming from a provider role as from a family or lived expertise perspective.

To help make this an easier task, consider recruiting providers from agencies that provide families a strong voice who may be able to help you identify family members to serve on your board, and providers who would be willing to serve on your board.

## 3. HOW MANY PEOPLE WILL SERVE ON THE BOARD?

The size of the board can affect the tone of the conversation, the scope of the issues the board can address, and the likelihood of achieving certain goals. Think about how different group sizes align with your goals. For example, it may be easier to create a culture of psychological safety and mutuality and collaboration in a smaller board, while a larger board can provide more diverse perspectives.

Some agencies that have regional or statewide advisory boards, which are often much larger, have policies and procedures for regularly on-boarding new members, orienting them to the group culture and providing them a “host” who helps answer questions during their on-boarding process.

### How many of your own staff will attend?

You will also have to decide how many people from your organization should regularly attend meetings. Having your staff at the meeting can ensure the discussion is informed by your organization’s perspective and allows other members to ask questions. However, too many representatives from your organization can take away the feeling of ownership from the families and other providers on your board.



## 4. WILL BOARD TERMS BE LIMITED?

Some advisory boards allow members to stay on as long as they are willing, while others set limits on terms to ensure new members are rotated in and out of the board. The most important outcome is to create trust and transparency, so members must know when they join whether their participation is open ended or time limited.

### BENEFITS OF INDEFINITE TERMS

- » When an advisory board goes well, members may value their participation so much that they don’t want to move on/stop participating. In some examples we’ve heard, members felt insulted or rejected when told that their tenure was ending and they would be replaced with a new member. Making participation indefinite avoids this potential.
- » The presence of board members who have years of experience may help maintain the culture of the group and provide a historical perspective. This may provide for more organic on-boarding & fewer agency resources devoted to mentoring.

### BENEFITS OF LIMITED TERMS

- » Some people may be hesitant to commit to an indefinite period of participation but find it easier to “try out” being a board member if they know it is a time limited commitment.
- » If members are rotated, the board size remains consistent

- » Allows more people to provide fresh perspectives and avoids tendency of new members to defer to members with more seniority
- » When turnover of membership is routine, there may be energy invested into ensuring that the relationships and connections that have been developed are maintained. In some organizations, this has turned into an extension of programming that was unexpected but became highly valued.



## 5. HOW SHOULD YOU RECRUIT MEMBERS?

Depending on the setup of your advisory board, you could be recruiting many types of people: providers in various disciplines, researchers, birth families, resource families, children, young adults, families as a whole. Below are some things to consider for recruiting both providers and family members:

### THINGS TO THINK ABOUT WHEN RECRUITING PROVIDERS

Are the providers you invite going to have time to attend meetings and put energy towards the group? Often we invite providers because we like them or they work in a key role. But if they can't show up, they aren't going to contribute much. Plus, having inconsistent attendance may undermine the cohesiveness or safety you are seeking within the group.

#### Characteristics to look for

- » Willingness to put away the "provider or clinical hat" and work with family members as colleagues with equally valuable expertise
- » Willingness to be brave and honest with their feedback, even with family members in the room
- » Come from an organization that supports their participation and has a culture of safety trust and transparency necessary for them to talk freely in front of family members
- » Able to consistently attend
- » Willing to learn and grow from this experience



### THINGS TO THINK ABOUT WHEN RECRUITING FAMILIES

#### Will you invite only adults, or youth as well?

This is an important decision - combining adults and youth requires sensitivity to language, dynamics, and ensuring that everyone feels that they have an equal opportunity to participate and contribute. In our experience, adults often want youth to be integrated into a larger conversation while youth often want a space of their own. Asking for help in identifying how to meet the needs of both youth and caregivers may be useful. Often this can mean a hybrid of large group conversations combined with break out discussions.

## WHEN RECRUITING FAMILIES (CONT.)

### How will you accommodate families' schedules?

Even if your meeting is outside of business hours, there can be barriers for families to attend an advisory board meeting. Some ways groups mitigate these barriers include:

- » **Provide childcare:** Can dramatically improve attendance, but adds a layer of complexity and expense to your meeting
- » **Provide a meal:** Can help increase psychological safety and make it easier and more appealing for everyone to attend. Again, this adds more work to meeting preparation and paying for food is not always permissible.
- » **Meet infrequently:** May lessen the time burden, but may also lessen the amount the board can accomplish.
- » **Meet virtually:** This idea appeals to many because of the logistical challenges of face to face meeting. It however is seldom as effective as in-person meetings and is recommended only to augment face to face conversations rather than replace them. See more about virtual meetings on page 10.

### Will you pay families?

If your combined advisory board includes providers who are paid for their time, you need to find a way to compensate families for their time as well.

### Will you include families currently receiving services?

- » Some agencies only recruit family members who have already completed treatment. This can lead to members with more insight into the entire process, but may narrow the pool of potential applicants and exclude other valuable viewpoints.
- » Some agencies recruit families who are currently receiving services. This can make it easier to recruit families to participate, offer valuable insight from families still experiencing the process and serve as an additional partnering strategy.
- » Regardless of whether people are through treatment or not, there will be times when people may struggle & be unable to participate fully. The answer is not choosing the right people but having mechanisms in place to support according. There will be bumps in the road.

## CHEERLEADERS VS. DISSENTERS

When recruiting for an AB it may be tempting to invite colleagues and families who you know well and who are already cheerleaders of your organization.

### Pro's

- » Existing relationships with your cheerleaders will make it easier to get the board running
- » It can be less threatening to form or present to a board when you are confident you will receive positive feedback
- » Cheerleaders may be more likely to show up consistently and be supportive of your efforts

## Cons

- » If one of your board goals is to gain insight into how your organization can work better, surrounding yourself with cheerleaders may be less helpful than including those who are less familiar or more critical
- » If the people on your board aren't willing to give constructive criticism, it may not be worth the while to host an advisory board, because it will not provide value by helping notice opportunities for growth

*Some organizations start out with cheerleaders and slowly over time add dissenters, allowing them to get started and create a productive culture while not missing out on a more critical perspective than can be vital to growth.*



# 6. HOW WILL YOU PREPARE AND ORIENT BOARD MEMBERS?

## PARTICIPATION AGREEMENT

A participation agreement identifies the commitment and reasonable expectations of everyone involved. Often, it is best to ask the group what *they* think should be in the agreement before signing, and review the agreement on a yearly basis.

## SETTING EXPECTATIONS

### How frequently should we meet?

Most groups hold meetings between one and two hours, but the frequency of meeting can vary greatly

- » Monthly: Allows members to dive deeper into topics and helps maintain momentum for a particular project, but is a larger commitment for host and participants alike.
- » Quarterly: It is a realistic commitment to attend a meeting 3-4 times a year, but it also means starting from scratch every quarter. Expecting people to remember what happened 3 months ago is not realistic, so more of each meeting must be devoted to orienting people & therefore you have less time to make decisions.
- » Twice per year or less: May be slightly easier to recruit members, but will only be able to consider macro level issues

### Length of project

- » Will your board operate indefinitely, or for a specific amount of time?



## How feedback will be used

It is important for board members to know upfront how your organization will use their feedback. In some programs, feedback from the advisory board is weighted heavily, while in others it is considered as one of many perspectives.

Regardless, this is a key opportunity to create trust and transparency so if you aren't sure how decisions will be made, explain what you hope to have happen and then let members know afterward what actually happened. Then make sure to let them know - don't wait 3, 6 or 9 months to tell them what happened.

## CONSIDERATIONS FOR FAMILY MEMBERS

- » May not have experience with formal, business-like meetings
- » Often think they only thing they have to contribute are the details of their story -- some coaching may be required to help them understand that they can have feedback that is informed by their story, but isn't limited to the details of their story
- » May need clarification on the purpose of the group, and how it differs from therapy

## CONSIDERATIONS FOR PROVIDERS

- » Need enough notice that they can protect the time needed to participate
- » May need to be prepared for treating a former client as a colleague - to not rescue and to trust in partnership
- » Must be prepared to be open to feedback and constructive criticism



# 7. HOW WILL YOU STRUCTURE MEETINGS?

## CAN PEOPLE JOIN VIRTUALLY?

As virtual conferencing has become cheaper, easier, and more accessible, many advisory boards have allowed members to join meetings virtually.

- » Pro: Virtual meetings allow more people to attend and participate -- Those outside of your region, those with mobility issues, and those who cannot be physically available at the time of your meeting
- » Con: Virtual meetings may reduce participation and feelings of psychological safety. In a combined group, if families participate in person and providers participate virtually, or vice versa, this can undermine the sense of partnership

If meeting virtually is a goal, our experience dictates that some sort of hybrid approach combining in-person meetings with virtual gatherings works the best. Relying on virtual meetings alone will obviously reduce the ability for board members to develop relationships and therefore trust, collaboration and mutuality, peer support, and safety.

# WHO WILL FACILITATE?

A skilled facilitator is key to a productive meeting. There are several types of facilitators you can use.

## From your organization

### Pros:

- » An internal facilitator knows what your organization needs to get out of the meeting and has a vested interest in productive results
- » This person is likely familiar with everyone on the board and the material being discussed

### Cons:

- » Internal facilitator may slant the discussion in way that is favorable to the organization but does not encourage constructive feedback
- » An in-house leader may give the sense of a hierarchy and detract from the feeling of shared power among all participants

## Provider from another organization

### Pros:

- » A facilitator from outside the agency is more likely to have an unbiased opinion about the organization and encourage more constructive criticism
- » As a trained facilitator, the person likely has experience running meetings
- » Choosing an external facilitator shows that the organization is comfortable sharing power and working in partnership

### Cons:

- » Facilitator may be less familiar with the needs of the organization
- » Facilitator may be less invested in the success of the board and organization
- » Dedicating time to the advisory board will likely be competing with many other priorities

## A parent

### Pros:

- » Demonstrates a commitment to treating the perspectives of parents with the same regard as professionals
- » May prevent providers from dominating the discussion
- » Can be a good growth opportunity for parents

### Cons:

- » Like a facilitator from another organization, a parent may require a bit more orienting to understand what the organization needs from the Board similar to an external facilitator
- » It may be harder to find a parent who has experience running professional meetings or there may be a need to mentor parents until they gain the needed level of experience and comfort facilitating
- » If parents aren't on the agency payroll, it may be harder for them to consistently facilitate if meeting times conflict with their "regular" jobs or parenting responsibilities.

## Same facilitator every time?

Some boards operate with one person designated as the facilitator, or chair, for a period of time. Others rotate each meeting. A consistent facilitator for a period of time offers predictability to the meetings and the opportunity for the facilitator to improve. Rotating a facilitator allows more people to play this role, encourages buy-in from more participants, and allows facilitators to learn from each other.

## NOTICE AND REMINDERS

Even though someone has committed to serving on your board, they still may not show up. They could forget or other things could come up. It is especially important to make every effort to get people to show up during the first meetings, before it is routine.

### Tips for getting people to show

- » Send the agenda ahead of time: This lets people know the meeting is worth their time
- » Personal, not mass, e-mail: For e-mail reminders, consider personal e-mails that demonstrate you value the attendance of a person for a specific reason, especially at first
- » Try phone calls and texts for parents: e-mail is often the language of business people and may not reach people who don't use e-mail as much. You could also have other family partners make calls.
- » The more people are involved in creating the board, the more connected they feel to the other board members, the greater the likelihood they attend consistently and actively contribute.



## FINAL THOUGHTS

### COMMUNITY CONNECTIONS ADVISORY BOARD: EMPOWERING FAMILY PARTNERS

One of the many purposes for developing an advisory board is to strengthen partnering work, a fundamental goal for any organization seeking to work in a trauma-informed way. Advisory boards, while a catalyst for this, probably won't be the only avenues to partnership. Agencies may find that partnership is a practice that needs ongoing attention.

One agency, Community Connections, started out with a more traditional family-member-only advisory board but then transformed that into a provider-and-family board to facilitate more opportunities for working collaboratively and learning about varied perspectives.

Recently, they decided to put a family partner in charge of the entire board -- organizing, facilitating, and leading. This marked a next step in their development and demonstrated their commitment to the elevating the role of lived experts in their organization. It also expanded the opportunity for family partners to fill a paid leadership position in the agency, and provided an important example of how family members' contributions can go beyond just sharing their stories.

# THOUGHTS FROM AN EXPERIENCED FACILITATOR

As a Network Liaison for the National Center for Child Traumatic Stress, I've seen many organizations form advisory boards. I've seen them struggle, dissolve, or be forgotten about, sure, but I've also seen them serve as incredible tools for moving an agency farther toward partnership - helping them embody collaboration, mutuality, trustworthiness and transparency.

There is no established, dependable approach for setting up an advisory board. Every organization has a different mission, way of doing business, and set of stakeholders. I have seen groups that meet infrequently provide tremendous value, and I've seen groups that meet frequently do work that meaningfully advances the mission of the agency. I've seen groups of all types fail to get anywhere.

The key, it seems to me, is having a vision of what you want from your group, and understanding the decisions you'll need to make ahead of time. Hopefully this tool can help demystify the process of starting a board -- and in turn, help your organization continue to grow and thrive.

» Chris Foreman  
National Center for Child Traumatic Stress

## ABOUT NCTSN

The National Child Traumatic Stress Network (NCTSN) was created by Congress in 2000 as part of the Children's Health Act to raise the standard of care and increase access to services for children and families who experience or witness traumatic events. This unique network of frontline providers, family members, researchers, and national partners is committed to changing the course of children's lives by improving their care and moving scientific gains quickly into practice across the U.S. Learn more at <http://nctsn.org>



## ABOUT FITT

The Family Informed Trauma Treatment Center (FITT) Center at the University of Maryland partners with families, providers and local and national networks to increase behavioral health equity for children and families who have experienced chronic trauma and stress. Learn more at <http://fittcenter.umaryland.edu>



## ABOUT CRF/ITR

The Center for Resilient Families, part of the Institute for Translational Research in Children's Mental Health at the University of Minnesota, aims to bring evidence-based parenting practices into practice for parents across the country, and raise awareness about the importance of parenting. Learn more at <http://crf.umn.edu>



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