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How to Develop and Maintain Consumer Advisory Boards





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How to Develop and Maintain Consumer Advisory Boards

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1. Introduction

In 1986, Congress passed the Protection and Advocacy for Mentally Ill Individuals Act requiring that protection and advocacy agencies establish consumer advisory boards consisting of at least 50% mental health consumers or family members. Consumer advisory boards, however, need not be limited to protection and advocacy agencies. In 2003, the President's New Freedom Commission on Mental Health report emphasized the importance of having consumers lead the design, implementation and evaluation of mental health service systems. These key benchmarks were important to the consumer movement, but more work to be done.

For the purposes of this booklet, a consumer advisory board is an ancillary body that provides its organization with guidance on questions germane to consumers. Any mental health organization, and indeed any organization whose activities affect consumers, can establish such a body.

Creating and maintaining such an advisory board can be a demanding process. Advisory board members need to be recruited and trained. They must understand their purpose as a group and they must remain motivated to meet their group goals. This booklet, *How to Develop and Maintain a Consumer Advisory Board*, will walk you through the steps for establishing and maintaining a healthy consumer advisory board.



2. Focusing on the Advisory Board's Mission

For a consumer advisory board to be effective, it must have a clear, compelling purpose. An example of a typical statement of purpose for a consumer advisory board follows:

To provide input and make recommendations to The Students' Mental Health League on matters important to consumers.

Most consumer advisory boards are established by the Board of Directors to provide guidance and expert assistance on matters germane to consumers. Take a moment to write down a statement of purpose for your consumer advisory board below:

Statement of Purpose:

We will return to this statement of purpose in subsequent exercises.



3. Recruiting Advisory Board Members

Recruiting advisory board members takes extended effort. First, you must decide what special skills and qualities you will require of the individuals on your advisory board. Second, you must convince qualified individuals to give of their talents and time.

Just as an individual's skills can be listed on a resume, an advisory board's collective skills can be charted on a profile. On the following page is a sample profile for the fictitious Students' Mental Health League consumer advisory board. On the left is the list of characteristics that it would be useful for the advisory board members to have. At the top is a listing of advisory board members.

Of course, it is not possible for any single individual to fulfill all of the advisory board's requirements, but with the proper mix of members, the advisory board should be able to meet its responsibilities. Take a moment to look over the sample profile on the following page.



Sample Advisory Board Profile: Students' Mental Health League

	Karen	Carlos	Wanda	Gail	Oscar	Cliff	Judy
Needed Characteristics							
Consumer	✓	✓		✓	✓	✓	
Family Member			✓				✓
Student	✓	✓		✓	✓		✓
Health care professional						✓	
African-American			✓		✓		
Asian							
Hispanic		✓					
Native American						✓	
Experience with local advocacy			✓			✓	
Experience with state advocacy			✓		✓	✓	✓
Contacts with school board			✓				
Knowledge of children's issues	✓		✓				
Knowledge of depression issues	✓	✓	✓	✓			✓
Member of self-help groups	✓			✓	✓	✓	✓
Owns a car		✓	✓	✓		✓	✓

Note the characteristics that are being sought for members of this advisory board. The advisory board recruiter wishes a culturally diverse group of individuals representing different ethnic minorities. The recruiter wishes to include both consumers and family members on the advisory board. Some of the advisory board members should have clinical expertise in children's issues; others in depression issues. Some members should have experience in local advocacy; others in state advocacy.

Depending upon how you choose to organize your advisory board, you may wish to assign advisory board members different responsibilities. The advisory board could simply be a panel of advisors, each bringing his or her own expertise to the group, or certain members could hold the traditional offices of president, vice president, treasurer and secretary.



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Take a moment to consider how you wish to organize your advisory board and what skills your advisory board needs. Using the chart below, create a profile for your consumer advisory board. Each column of the advisory board profile actually serves as a job description for the individuals you are seeking to recruit.

If you have already established your advisory board, you can check off current members' skills in the first columns of the chart. You can then determine what skills your advisory board is currently lacking and what types of individuals you may consequently need to recruit in the future.

Consumer Advisory Board Profile

	Current Members				Future Members		
Needed Characteristics							



Additional Tips for Recruiting Your Board

Look for individuals whose values reflect your statement of purpose.

Include the community at large, not just the mental health community: Consider the religious community, local service clubs, legal professionals, and colleges and universities as sources for prospective a Board of Directors.

Do not overload people who already serve on many committees – seek a balance between old and new leadership.

Specifically define the parameters of each position for which you are recruiting.

Use networking. Start with core people and have them suggest other contacts.

Contact people personally. Start with phone calls or visits, then follow up with letters.

If possible, interview prospective members face to face.

Few people who are setting up a consumer advisory board actually create a contract for new advisory board members to sign. Taking such a step, however, can further clarify the responsibilities and can serve to stress to new advisory board members the importance of meeting these responsibilities. A sample contract for new advisory board members to sign is included below:

Contract for Consumer Advisory Board Members

I, (new advisory board member's name), agree to serve on the Consumer Advisory Board of (name of organization) from the period of (start date) to (end date) in the position of (title). I understand that my responsibilities will include (detailed listing of all responsibilities). I will do my best to meet all of my duties to the best of my capabilities, and I understand that inability to meet my responsibilities may result in dismissal from the advisory board.

(new advisory board member's name) (current advisory board president)
 advisory board member's signature, date president's signature, date



4. Orienting the New Advisory Board

Once you have selected your advisory board members, they will need orientation and guidance. Orientation materials should provide them with an overview of the organization, of its basic structures and workings, of its programs, employees, volunteers and clients.

For some advisory boards, the members will never even meet together as a group. Advisory board members may live in different places and may function as a pool of experts who are contacted individually. In this case, you will have to give some thought to how you will communicate with these individuals: Will you contact them by e-mails, via conference calls? Will you communicate on a regular or on an ad hoc basis?

In cases where the advisory board is to meet and to function as a group, then orientation activities that bring out the advisory board's talents as a team are needed. The single most important factor determining an advisory board's effectiveness is a shared vision amongst advisory board members.

This common vision should, of course, be embodied in the statement of purpose. One powerful and simple orientation activity is to have all advisory board members write down the consumer advisory board's statement of purpose. They can then share what they have written down with each other before consulting with the actual statement of purpose.

Besides being clear on the statement of purpose, advisory board members must also know what their group responsibilities, in service of the statement of purpose, should be. Typical responsibilities for a consumer advisory board could be:

- Reviewing organizational publications
- Assessing the Board of Directors' performance
- Organizing special activities to promote consumers
- Advising the Board of Directors on how best to meet consumer needs



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Use the space below to come up with a list of responsibilities for your consumer advisory board. You may either formulate this list yourself and then present it to the members or, if you wish a more empowered advisory board, you may ask the group to define its own responsibilities.

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____
10. _____



5. Assuring Outcomes

For your consumer advisory board to be successful, you must have a way to monitor whether its responsibilities are being met and how well these responsibilities are being met. Outcomes assurance need not be complicated or elaborate. One simple way to monitor outcomes is to refer to your list of advisory board responsibilities from Section 4 and to itemize several ways that you can know that each responsibility has been met and met well.

For example, Section 4 already noted that typical responsibilities for a consumer advisory board can include:

- 1) Reviewing organizational publications
- 2) Assessing the Board of Directors' performance
- 3) Organizing special activities to promote consumers
- 4) Advising the Board of Directors when consumers' needs are not being met

Ways to monitor whether and how well each of these responsibilities is being carried out might entail:

- Responsibility 1)** Reviewing organization publications
Outcome assurance: Publications are mailed to each member of the advisory board. Comments are due back within two weeks.
- Responsibility 2)** Assessing the Board of Directors' (BOD) performance
Outcome assurance: Advisory board meets quarterly to discuss BOD's performance; BOD president reports monthly to advisory board; Are attendance rates good for self-help groups?; Have any members registered complaints?
- Responsibility 3)** Organizing special activities to promote consumers
Outcome assurance: A depression screening day will take place in August and at least 200 individuals will be screened; An ask-the-doctor session will be organized at our yearly conference and at least 20 individuals will attend
- Responsibility 4)** Advising the Board of Directors when consumers' needs are not being met
Outcome assurance: Members will receive a postcard in the newsletter for reporting complaints: The advisory board president will attend and report at all BOD meetings.

Using your own list of advisory board responsibilities from Section 4, list the ways that you can know each responsibility will be met effectively.

Responsibility 1) _____

Outcome assurance: _____

Responsibility 2) _____

Outcome assurance: _____

Responsibility 3) _____

Outcome assurance: _____

Responsibility 4) _____

Outcome assurance: _____

Responsibility 5) _____

Outcome assurance: _____



Besides evaluating the effectiveness of the group as a whole, it is also important to evaluate individual advisory board members. Below is a sample chart used to evaluate a consumer advisory board member on seven key items.

Sample Evaluation Form for Advisory Board Member

Criteria	Good	Fair	Poor
Attendance	✓		
Timeliness with assignments	✓		
Quality of feedback on assignments	✓		
Brings useful proposals to table	✓		
Knows the mental health community			✓
Good contacts with B.O.D.		✓	
Works well with staff		✓	

Evaluation criteria should be based on the needs of your specific advisory board. You can use copies of the blank chart on the following page for assessing your own advisory board members.





How to Develop and Maintain Consumer Advisory Boards

Evaluation of Advisory Board Member, _____

Criteria	Good	Fair	Poor



6. Educating and Motivating Advisory Board Members

Most individuals who volunteer on an advisory board do so because they hope to make a difference in some way and because they hope to develop useful skills. To motivate your advisory board members, you must not only give them opportunities to provide tangible input, but you should also provide them with opportunities to learn.

Ongoing education helps to keep advisory board members active and motivated. Workshops on such topics as media relations, managed care, seclusion and restraints, or advocacy may all serve not only to inform but also to inspire.

Below, write down several ideas for workshops, retreats, or other avenues for education that you can offer to your consumer advisory board:



What if an organization doesn't want consumer involvement?

Politics is the art of the possible. Approaching people in decision-making capacities with common sense arguments that decisions should never be made without the voice of the people affected is the first step that you should take.

Use all avenues when advocating for the creation of a consumer advisory board for a mental health organization. Make phone calls and write letters. In addition to speaking with the decision makers in the mental health organization, you may want to join forces with other organizations, such as family organizations as a way to secure the establishment of a consumer advisory board. Be persistent!

It is also important to remember that you do not have to wait for a law to be passed requiring consumer participation to become involved. You should attend meetings and promote your own involvement as a knowledgeable citizen. Becoming known as a reliable source of information and establishing one-on-one relationships with those people in power is probably the single most effective thing you can do. Many times, it is the behind-the-scenes conversations where you can make a real difference.

Finally, think about where you are trying to get representation. Establishing advisory boards is a step in the right direction, but it is not as good as having seats at the table at actual governing boards. Always lobby first for the governing positions.

7. Troubleshooting

Maintaining a healthy consumer advisory board is an ongoing and constantly challenging process. Below are some final questions that you should consider in developing and maintaining your advisory board:

- How will you ensure involvement of racially and ethnically diverse people?
- How will you ensure consumer involvement?
- How can your advisory board avoid “tokenism”?
- Will your advisory board meet as a group or will you call upon advisory board members individually?
- How often, if at all, should your advisory board meet?
- Should you compensate advisory board members financially for their time or their travel expenses?
- How can you distinguish between staff and advisory board responsibilities?
- How can you promote cooperation between advisory board and staff?
- How can you reward particularly effective advisory board members?

Appendix Profile of an Effective Advisory Board Member

This manual has concentrated on establishing and maintaining a consumer advisory board, but a related question is how can members of such an advisory board perform their jobs most effectively? Below are some tips on being an effective advisory board member:

- Attend advisory board meetings.
- Complete assignments on time.
- Feel comfortable asking questions; other people are probably wondering the same thing.
- Know the mental health community. Attend community meetings and events.
- Know your organization. Take advantage of opportunities to meet the CEO and Board of Directors.
- If you have a topic you wish to bring to the agenda, follow through: talk with other advisory board members and with the advisory board president.



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