

Recruiting, Empowering and Using an Advisory Board

There are two important considerations before creating an Advisory Board. The first one is to consider carefully if you really want an Advisory Board. The advantages and disadvantages are listed below. The second, and equally important consideration, is to carefully define how you would use an Advisory Board.

Reasons why a priest might want to create an Advisory Board:

1. Excellent alternative source of parish intelligence
2. An array of expertise at your fingertips
3. A “landing place” for maverick, independent, free-spirit, highly self-directed types who cannot or should not work in a committee or wouldn't want to serve on the parish council, or whose life experience and success is far beyond the typical operational issues that unfortunately tend to dominate the agendas of parish council meetings
4. Can be a good place to “vet” prospective future community leaders or future parish council members
5. Service on an Advisory Committee offers an excellent opportunity to cultivate “outliers” whom you would like to have more involved in parish life
6. Advisory Committees can actually serve as a “portal of entry” for those non-Orthodox but highly sympathetic people to become Orthodox
7. Some Advisory Committee members may possess significant ways or means to be of very meaningful service to the community and volunteering on this committee may increase their interest and involvement in the development of the parish
8. A safe way for a priest to check his thinking, either in a general meeting of the Advisory Committee or in one-to-one phone calls – especially if the Advisory Committee member can be trusted with confidential information
9. A safe way to keep sometimes troublesome members of the parish close at hand and part of an ostensibly wisdom-dispensing group of peers
10. Properly managed, an Advisory Board can be a way to effectively project influence by the priest and/or parish council chairperson into the community.

Reasons why a priest might not want to create an Advisory Board

1. It's one more organization that you will have to tend to (varying according to the capabilities and commitment of the Advisory Board Chairperson) and some of the members, being mavericks, may require some additional time from you
2. Some parish council members may feel threatened by the creation of a group that contains powerful people whom they fear may overstep their advisory function and usurp the responsibilities and prerogatives of the parish council
3. There is always the issue of those who might be offended if they are not invited to serve on the Advisory Board
4. Purists in the parish may object to non-Orthodox serving in an advisory capacity if you decide to involve non-Orthodox this way
5. If cast into an inactive role, the Advisory Board may feel the disappointment that follows an enthusiastic beginning that eventually devolves into a nominal organization that exists merely on paper and really serves no useful purpose

Advisory Boards can serve an extremely useful purpose for a strategic planning process, a capital campaign, a construction project, the launching of a major new program within the parish or as a means for the priest to receive alternative thinking.

Advisory Boards can also assume a variety of forms. Some priests create an association of former parish council chairs with whom they lunch once a month. They say that it keeps their ears close to the conversation and activities going on within the community. Other priests may have an intimate group they counsel with and depend upon for moral and emotional support. Perhaps they don't even have a functioning title – they're just dependable and trusted friends. Some are hands-on, meeting monthly or more, though this is rare. Others meet quarterly, with an eye to the big picture. Many consist solely of interested outsiders, but a good number include insiders as well. What all such boards share is this: They advise, evaluate and play devil's advocate.

There are obvious advantages and disadvantages (as listed above) with the formal creation of an Advisory Board or Advisory Council. They tend to be more active and involved with there is a special project underway – a capital campaign or a strategic planning process. Conversely, they tend to be less active when the parish is quieter.

Busy or quiet, it falls upon the priest, perhaps working with the parish council chair and/or the chair of the Advisory Committee to develop interesting, stimulating and useful ways to involve them and access their

skills-rich, experience-rich, wisdom-rich or rich-rich resources to meaningfully assist in the fulfillment of the mission of the parish.

Wise priests will realize immediately that it is important to reassure and affirm to the parish council that their critical roles are not infringed upon and that they remain the formal, legal, responsible, policy-formulating, deliberative and governing body of the parish. It will be important for them to understand how the Advisory Board will be of indirect help in members fulfilling parish council responsibilities. A wise priest will ensure that the parish council chairperson is always an ex officio member of the Advisory Board and that he or she has access to them at any time.

As noted above, there sometimes exist individuals of enormous intelligence, vast experience and serious wealth who have neither the interest, nor the time to serve on a parish council or any organization within the parish. It would probably be a mistake to recruit them to parish council service. These are special cases where a one-to-one relationship with the priest is important. It is incumbent upon the priest to make an effort to understand their world and enter into their world and avoid always trying to pull them into his world where he feels empowered and knowledgeable.

An Advisory Board is an excellent opportunity to involve these people in a way that is commensurate with their life experience. Advisory Boards may only meet quarterly. They may meet by conference call because it's a long commute to the parish or they're just very busy people.

Be creative in how you involve them. The author of this article asked the Orthodox managing partner of one of the largest consulting companies in the world (130,000 consultants) if he would serve as a quiet advisor to him through a strategic planning process. The author would send to the managing partner key documents that were produced out of the planning process for review and commentary. The quiet advisor would also accept occasional phone calls from the author to discuss important issues. The author still wonders how much that time and counsel would have cost on the open market. The quiet advisor's audience was strictly fortune 500 CEOs, university presidents and senior members of governments both here and abroad.

In other parishes, the author has met multi-billionaires, heads of huge corporations, restaurateurs who own hundreds of restaurants, senior level consultants of eminent consulting firms, university presidents, heads of enormous nonprofits, etc. These people often languish at the edge of the parish with little or no way to be meaningfully involved. Yet, if they were involved, they would have much to offer in terms of parish development

and mission fulfillment. Once again, a priest should make as serious an effort to understand their world as he makes to understand what shut-ins speak to him about in their world.

Consider social gatherings of the advisors with their spouses. Build a sense of community and fellowship among them. People often become more involved in parish life and actually become Orthodox because someone asks them to. Write a white paper, no more than a couple of pages, regarding a project or a program you want to undertake, mail it out before the meeting and let this be one of the topics of discussion. See the board development document on creating strategic intent in the parish council for other ideas. Learn from them. They may have a world of experience that will benefit your leadership.

It's important to determine the objective(s) of your Advisory Board. They can be general in scope or targeted to specific issues such as adopting new technology or initiating a dynamic and even revolutionary program in the parish. They provide timely knowledge about trends, technology and "competitors". They can help you look at your own operations with an open mind.

Choose the best prospects according the purpose you imagine for your Advisory Board, with an eye to the specific skills you seek. You want members to be problem solvers who are quick studies, have strong communications skills and are open minded.

Big names can be a bonus ... but not always: Getting a heavyweight on your Advisory Board can give you credibility, but it's also important to have members who are going to spend the time to give you thoughtful advice or are well connected and willing to make introductions.

When inviting a prospective member to join your Advisory Board, you should lay down the ground rules about what is expected in terms of time, responsibilities and term of service. Specify the areas in which you're seeking help. If the Advisory Board is going to discuss issues that include confidential information, members should be notified that discretion will be tantamount.

In the for profit world Advisory Boards are compensated. Do consider how you will compensate your Advisory Board – not monetarily, of course. Once again, be creative – a special book, a quiet evening with the bishop or an Orthodox scholar when they visit the parish. In one community, the Advisory Board (who were also personally recruited major donor prospects) was taken to see an Atlas rocket launch by the capital campaign

chairperson! Keep in mind that your members will likely benefit themselves in a variety of ways. Being on your Advisory Board will expose them to ideas and perspectives they may have otherwise missed. It will also expand their own networks and provide them with a way of giving back through the gifts of time and talent. Don't fear speaking the gospel to them in kind and sensitive ways. In their insulated world this may be a very uncommon but meaningful experience for them.

Prepare for Advisory Board meetings well in advance. Choose a site that is comfortable and free of distractions. Careful thought should be given to developing the agenda and managing the meeting. Relate the task at hand to the life and teachings of the Orthodox Church. Solicit input for the agenda, and distribute important information ahead of time. Working with the Advisory chair, manage the session as you would any professional meeting, and follow it with an action plan. The facilitator should know which experts to draw out and how to stimulate a dialogue. He or she should be results-oriented, as ideas without action aren't worth much. The minutes should be written up and circulated to the members. The notes should include recommendations on key issues. These are often very busy people. Make sure they leave the meeting with the feeling that it was time well spent. Begin and end on the time you morally contracted with them when the meeting was set.

Ask for honesty. An Advisory Board must be open and frank, so don't be offended if you hear things you don't like. Your board will also suggest ways of correcting the problems they identify. Be a student and be a teacher. Only you have the knowledge of the theology, history, ecclesiology, and biblical training that has brought you all together to assist the parish. Help them to understand the mission, values and vision of the parish. An Advisory Board presents pastoral opportunity.

Keep Advisory Board members informed: Once they're on the board, keep members excited about the parish by giving updates at times when you aren't soliciting their advice. Try to keep the news upbeat and optimistic. The fact that they've agreed to be on the Advisory Board means they care about you and the parish, so keeping up-to-date will help them be of greater value to you. Remember that these people can be powerful advocates and allies for the mission of the parish.