

The Importance of External Boards

By Gary A. Olson FEBRUARY 22, 2008

In a recent Internet discussion among academic deans, the topic was whether departments and other academic units should create external advisory boards. The dean who raised the issue asked his colleagues whether they maintained boards, if they were genuinely beneficial, and what the ideal board would look like.

Some administrators are only now recognizing the value of advisory panels, but they have become indispensable to many academic units.

While business schools once enjoyed a virtual monopoly on the practice, today high-level external boards are ubiquitous. (My college operates four, and a number of our departments have, or are establishing, their own.)

Still, as the deans' online discussion showed, a wide range of views exists about the best way to organize such boards and about their relative value.

Presidents, deans, and department heads create external boards with a variety of objectives in mind, but they are most useful as tools to solicit strategic or programmatic advice, cultivate political influence, and support fund raising.

Advisory boards can take a number of forms. Among the most common: the community advisory board, composed of influential political and community leaders; the alumni board, made up of distinguished graduates; the professional board (often a specialized kind of alumni board), devoted to a specific career such as law or medicine; the emeritus faculty board; and the development board, which assists in fund raising.

The benefits of well-managed boards are many, but the key one is that they get people actively involved in the department or the college. Once board members are fully invested in the institution, they are more likely to support it financially and in other material ways.

Consider the experience of one departmental advisory board that included an alumnus who had just ended a long and productive career as president of several universities. He took it upon himself to become the department's champion and leveraged his considerable influence to raise an enormous amount of money for the department. My own college recently raised more than \$180,000 -- largely from members of our external advisory boards -- to endow a series of faculty and staff recognition awards.

External boards can benefit almost any academic unit. I know a president of a large but remote state university who has effectively extended his university's reach well beyond its geographical confines by establishing a number of "regional" advisory boards throughout the state. He appointed key political and community leaders as well as local alumni to the boards. Those groups have helped him acquire an unprecedented level of state support for his institution.

That kind of cultivation of friends is essential at this moment in higher education, especially in public institutions, where many universities report that the state provides less than 30 percent of their annual budget. In establishing a board, you might consider a number of best practices:

- One rule of thumb is to assemble a board of between 25 and 30 members, assuming that any given meeting will likely draw approximately half of the participants.
- Balance the original list of invitees carefully (keeping in mind such characteristics as gender, race, region, departmental or collegial affiliation, and so on).
- For best results, invite each potential board member personally -- by phone or in person. A direct invitation signals that you take the project seriously and allows you to explain your vision of the board's objectives and the member's role. Your energy and enthusiasm will persuade people to participate. No letter or e-mail invitation would ever be as effective.
- Although advisory boards, by definition, possess no authority over your department or college, treat them with the same attention and deference that you would a governing board. Your evolving relationship with the members will be likely to cultivate a culture of giving among the group.
- Compose (with board input) formal bylaws and procedures to regulate the mission, objectives, election or appointment of members and officers, and so forth.

- Because high-level boards are composed of influential people whose busy schedules will make it difficult to assemble everyone together at any given time, it is advisable to meet only two or three times a year and to schedule the meetings many months in advance.
- Crucial to the success of any panel is the selection of a productive chair, someone with whom you get along and who will guide the group toward your objectives.
- Much like a trustees' meeting, an advisory-board session should be held in a respectable venue (a corporate board room, perhaps). It should be organized according to a formal agenda, and include packets of relevant documents and supporting materials.
- To be effective, a meeting can't simply be a recitation of the college's accomplishments or the department's recent points of pride. People agree to serve on a panel because they want it to be useful, and they are acutely aware of unnecessary drains on their time. Meetings, then, must present genuine issues and provide ample time for discussion.
- Support the board with a dedicated Web site that includes the bylaws, minutes of meetings, photos and short bios of members, and other relevant materials. The site serves a utilitarian function but also showcases the support your department or college has from important people.
- Keep your board members engaged. Some experts advise that you stay in touch with members between meetings by periodically calling them or meeting them individually for lunch to ask their advice on an issue. You've brought them into the circle, so use them.
- Finally, determine whether to require board members to pay dues. Business schools typically levy a substantial annual dues payment. The amount may be as little as \$2,000, or as much as \$50,000, or more. Of course, in the business milieu, the dues probably would be paid by the member's business or corporation, not by the member personally. You will have to make that decision based on your own context. One dean of a college of education told me, "We chose not to require dues because we felt that doing so might discourage some prospective members from joining."

Of course, external boards can present challenges as well as opportunities. Many administrators establish an advisory panel because they genuinely wish to solicit advice. But board members need to understand from the outset that their "advice" is

just that -- recommendations that the college may or may not act upon. Stories abound of boards or individual members who have engaged in heavy-handed attempts to dictate direction or priorities.

That was precisely the scenario when the alumni advisory board for a small liberal-arts college locked horns with its president over the general-education curriculum. "My board chair insisted that we adopt a great-books approach to gen-ed," the president told me. "I tried to explain that our faculty governance system has an elaborate procedure for making such changes and that the faculty had twice rejected a great-books orientation." The pressure eventually reached such a level that the president disbanded the board.

To avoid such conflicts, the bylaws should clearly specify that the external board has no policy-making authority and that it exists only to serve as a sounding board for the dean or president. Members need to be advised of that from the beginning of their appointment, and it is wise to exercise control over which items are placed on the agenda.

Another safeguard is to make sure that the bylaws contain term limits for members so that someone can be eased off the board if necessary.

Still, the potential benefits of these boards outweigh the occasional conflicts. A well-managed advisory board can be an effective advancement tool, in the largest sense of the term: It can help you publicize your unit's accomplishments, cultivate potential donors, nurture existing ones, and extend your program's influence and support.

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