

Establishing and Leveraging the Expertise of Advisory Boards

The advisory board's makeup tends to consist of professionals with domains of expertise relevant to the organization they serve. Organizations invite advisory board members to guide the organization's efforts over an extended period. Still, they do not have fiduciary, operational, or decision-making responsibilities for the organization in the way that a board of directors does. This article provides a framework for a behavior-analytic organization to (a) identify whether an advisory board would be feasible and beneficial, (b) establish an advisory board, and (c) engage and manage an advisory board to best leverage the unique skills and interests of the members. The article includes 2 examples of advisory boards to illustrate the suggested framework and recommendations.

Various not-for-profit and for-profit organizations have advisory boards (ABs) that help guide their efforts. Recent years have witnessed a rapid growth in the establishment of new behavior-analytic organizations (e.g., provider organizations, technology companies, professional organizations), but few of these organizations have ABs. Some organizational leaders may not know much about ABs with respect to their structure and purpose, the benefits of having an AB, and the practical strategies for establishing, managing, and benefiting from an AB. The purpose of this article is to provide guidance to leaders who might consider establishing an AB for their organization. The article provides guidance on what might be gained from an AB; what the best structure, cadence, and responsibilities for the AB might be; and how the AB should be formed and led. Two organizational examples are used to illustrate the framework and recommendations.

Advisors and Directors

An AB is a group of individuals requested by the board of directors (BOD) or other leadership within an organization to provide various functions, including providing technical recommendations, bolstering brand and reputation, and potentially assisting with fundraising and identifying potential donors. In effect, their efforts are leveraged as ambassadors for the organization. These individuals are appointed to the AB rather than elected. In contrast to an AB, some organizations have a BOD, which does have a fiduciary responsibility to the mission of the organization. The BOD has frequent contact with leadership, and one primary responsibility is to ensure that it has the correct chief executive officer (CEO) or top leader in the organization. Members of both ABs and BODs typically serve a "term" for a preset amount of time (e.g., 2–3 years) and may be appointed to serve multiple terms. Browning and Sparks (2016) cite the Aspen Institute chairman, David Langstaff: "The role of the board is to ensure that purpose, vision, and core values are in place, and thus to give the CEO and the executive team the time and space to act responsibly" (p. 23).

Conversely, AB members have no responsibility to the organization, allowing them leeway to put forth specific recommendations and suggestions to improve the company. Though ABs do not have voting rights, they may report to the BOD (if one exists) or provide the BOD with information relevant to their responsibility to the organization. Occasionally, BODs may seek out ABs for this very reason. Additionally, AB members are not in a position in which their judgment could be unduly influenced. AB members are not employees of the organization nor members of the BOD. They do not operate as consultants or business advisors, which frees them to make robust recommendations that a consultant may hedge. The AB members may separately provide consultation or business advice, but the organization should arrange this in a different contract and in a manner that protects the role of the AB member.

Members of the AB are also not donors or fundraisers for the organization. The AB member is not under any responsibility to fundraise or increase the donor base, though the organization may select an AB member with an extensive network to develop strategic relationships. AB members are often in prominent areas of leadership or well known in the media or community, but they should be aware that there is no relationship, commitment, or responsibility related to fundraising so that they can fully assume the role of a trusted advisor. Members of the AB may often be inclined to associate themselves with an organization they support and, consequently, may recruit others in their network to provide various types of support to the organization.

The Purpose and Benefits of an AB

Benefits to the Organization

The members of an AB come with vast experience and vantage of their industry; because of this, they may assume leadership roles in significant associations, speak at conferences, or act as subject matter experts. The AB members' experience also includes failures

they have encountered directly or through their network. Having this information does not inoculate the organization from all failure, but it minimizes the probability. This key information can inform leadership as to what is on the horizon and allow them to modify their business or service delivery model to meet future demands. Having this vantage of the industry also allows the organization to remain innovative and at the forefront of their industry.

AB members may also connect with particular organizations and help serve the mission in unforeseen ways. The results of an exploratory study by Nagai and Nehls (2014) found that non alumni AB volunteers for colleges and universities developed emotional connections and pride in serving the institution similar to alumni. The connections led most of the volunteers who participated in their study to have a high level of engagement with the institution that was meaningful to them and resulted in their desire to continue as volunteers, even without having earned a degree from the institution. Other research suggests that ABs add critical governance to nonprofit organizations, as well as numerous other tasks. Saidel (1998) found that ABs are a critical instrument of governance in many public-benefit organizations, as they perform numerous, primarily organizational activities, link nonprofits to key stakeholder groups in the field, and strengthen ties of cooperation and shared purpose with other community actors.

An AB is also a great resource to gain perspective on areas related to delivering services ethically. The AB members will often have in-depth knowledge of the ethics code (Behavior Analyst Certification Board [BACB], 2014) and can provide leadership with feedback on practice standards and compliance with the code. In fact, it is common to explore ethical dilemmas with AB members. Moreover, it is good practice to bring up frequently encountered ethical scenarios or the most pressing ethical dilemmas with AB members. It is the organization and the individual behavior analyst's responsibility to ensure they are practicing ethically, but the perspective and accountability gained from the AB give a solid foundation for making sound ethical decisions.

Applied behavior analysis (ABA) organizations often encounter a great deal of variance in how Board-Certified Behavior Analysts (BCBAs), department leaders, and managers in the organization deliver services. This variance is rarely ideal and may lead to issues related to deficiencies in training and problems with scaling the delivery of services, among other potential pitfalls. The AB can assist with recommendations on creating standards for the primary systems within the organization. Providing the AB with information about the variance observed, and the inputs and outputs of the system, may help identify potential solutions, including recommendations for standards that may impact the entire organization.

AB members may also have relationships with many people in the field of behavior analysis. They will likely have connections that can assist with advocacy efforts and help establish favorable relationships for the organization. The AB member can help with introductions and begin strategic conversations. It is not uncommon during AB meetings to redirect an area of discussion to an area of expertise outside of the board, relying on AB members' outside connections. There are many areas within behavior analysis that require high degrees of specialization, and AB members can help identify and connect the organization with key thought leaders and/or experts. Gaining these relationships and perspectives elevates the quality of services provided.

Benefits to the AB Members

Some organizations provide a small stipend for serving on an AB, but the amount is usually small, serving as a token of appreciation rather than a significant participation incentive. Organizations should be careful in the use of compensation for AB members. The goal is to reimburse AB members for their expenses and to convey appreciation and not to put any undue pressure on AB members that would dissuade them from making recommendations. Serving on an AB can provide a unique opportunity for AB members to "give back" and/or contribute to a mission that is particularly important to them. According to *Board Governance*, a popular online blog, the two most commonly cited reasons for serving on an AB are to give back to the community in some way and to contribute time and talents to a cause about which one is passionate. *Fast Company* found a similar reason in that it allows the AB member to "channel creative energy in contributing productively in strengthening a nonprofit organization for a cause that is meaningful to you (Korngold 2008, para. 2)."

One of the benefits of being on an AB is the opportunity to inspire and shape an organization without the responsibility to ensure that the great ideas are implemented. The AB members often travel and visit other organizations, interact with new and diverse colleagues, generate innovative ideas, and often spend quality social time with colleagues. For ABs that convene several times a year, relationships are formed, not only with the host organization, but also between the AB members. The opportunity for an AB member to get to know and work with another AB member can be a powerful reinforcer. The AB members may not know each other well initially, but friendships and strong collegial relationships can form over time. Satisfied AB members are more likely to

stay on the board for more than one term, and the longer they serve, the more they get to know the organization and the better their advice may become.

Opportunities to provide mentorship may be a benefit of particular note for AB members. The notion of mentoring has been studied extensively and is generally associated with protégé career development and growth; however, recent mentoring research is beginning to acknowledge that mentors gain substantial benefits from mentoring. Ghosha and Reio ([2013](#)) found data to support the concept that mentoring is reciprocal and collaborative and not simply beneficial for the protégés.

Rewarding and Retaining AB Members

Finally, some AB opportunities include a variety of other benefits. For example, the AB members can be lodged in nice hotels and dined at upscale restaurants for less than the organization might pay for a single paid consultant who would provide some of the same guidance. In particular, group meals enhance the social experience and provide an opportunity for various employees and board members of the organization to join the outing and collaborate further. The organization can also provide a variety of small gifts that make the visit more pleasant and represent the organization. Finally, identifying individual preferences and providing healthy and preferred snacks and beverages in the hotel room prior to arrival make travel a more pleasant experience. More information on the hospitality-related logistics is provided in the section on the logistics of AB meetings.

Evaluating the Organization's Readiness for an AB

Prior to establishing an AB, the leaders of an organization should determine whether they are ready to benefit from having a board. There are various life stages of an organization, including start-up, growth, maturity, rebirth/renewal, and decline (Lester, Parnell, & Carraher, [2003](#); Quinn & Cameron, [1983](#)). Not every stage is well suited to the efforts of an AB. For example, an organization in the start-up phase is typically not ready for the input of multiple advisors. Similarly, an organization that is clearly in decline may be struggling with significantly bigger problems than a volunteer AB is likely to be able to solve. It takes a generally healthy organization that is either in growth mode or stable and looking for reinvigoration to establish, sustain, and benefit from the efforts of an AB. It is important to conduct a self-evaluation of the organization's readiness before creating the board because a failed AB can impact the organization's reputation and appetite for future AB establishment. Consider the following questions/variables to conduct this self-evaluation.

First, there must be a clearly established proof of concept and the organization must be a fully viable entity (e.g., financially stable, reasonable reputation). The organization and the leaders of the organization must have some credibility as reasonable members of the professional community; otherwise, potential AB members may be unwilling to associate their names with the organization. Additionally, members of the BOD and/or executive team should have some connections to potential AB members to increase the likelihood that the invited members will be willing to consider the opportunity. The board members are typically eager to help a good, viable organization become better and stronger, but they are not eager to rescue failing organizations or assist with newer organizations. Organizations that are poised to grow or increase their quality of services, or both, often find ABs particularly valuable and willing to help.

Second, the organization should have a clear governance structure in place. The AB does not substitute for a BOD or executive team; it merely advises them. The BOD, if the organization has one, must be well established and have reasonably successful board relations before it is wise to introduce another group designed to offer guidance. That is, the BOD must be functioning well enough to be receptive to the guidance offered by an AB. The AB may offer guidance that is counter to the opinion of one or more of the BOD members, so it is helpful to have a BOD that is comfortable with open discussion and willing to entertain a variety of ideas. A well-run BOD is also well versed on the bylaws of the organization and has a process in place to ensure compliance. The BOD should carefully review the bylaws to determine whether there are any barriers to forming an AB or stipulations that would make it difficult to interact with the AB.

The AB could be established as an ad hoc committee of the BOD or could function at the discretion of the executive team if there is no BOD. In addition, there should be at least one member of the executive team (e.g., executive director, clinical director) in place and stable in the position prior to establishing an AB. This increases the likelihood that the executive team can respond positively and take actions that are advised by the AB. Essentially, this criterion is evaluating the organization's willingness to hear reflections and insights about performance, including hard-to-hear opportunities for growth and change, and to act on those insights.

Third, the organization must have the financial resources and workforce to devote to establishing and maintaining an AB. Although there is usually minimal direct compensation to AB members, there are direct expenditures associated with maintaining an active, engaged AB. The organization must be ready to support travel costs for the board. In addition to the direct expenditures for the board, there are significant indirect costs associated with an AB. The organization must also be ready to engage the staff required to manage the board and take action on their recommendations. The task of managing the AB typically falls to one member of the executive team (e.g., executive director) unless the task is assigned to another employee or consultant. If the organization cannot afford at least a portion of an assistant's time to manage logistics, the organizational leader may end up managing many details, which may not be the wisest use of a leader's time. Any time the organization is devoting to establishing and maintaining the board should not jeopardize the critical daily functions of the organization.

In summary, an organization may be ready to benefit from having an AB if (a) it is a viable entity prepared for a growth trajectory or quality-improvement initiative, (b) there is a sound governance structure and established executive team, and (c) there are sufficient financial and employee resources to devote to the AB and the recommendations of the AB. When these conditions exist, an AB can become an invaluable source of guidance and vision for organizational change, growth, and improvement. The rest of this article offers guidance on recommended actions to establish, refine, and manage an AB.

Establishing the AB

The organization should decide who will take the lead in developing the board and function as the implementation champion. A key first decision is the available budget for the AB. In developing the budget, consider travel costs, honorariums, and other perks you plan to provide to express your appreciation. Then identify the duration and frequency of board meetings. In making this decision, consider the plan for the advisors' time during the visit. You will want to schedule meetings and times for AB members to observe programming and interact with various staff. The leadership should determine the benefits that they are seeking from having an AB and specify what demands must be met to achieve those benefits. All of this information will help make the determination as to the number of advisors to have on the board. For example, there may be a benefit to starting with a small board and increasing based on the needs of the organization.

The next preparatory step in designing the AB involves identifying the organization's areas of need. According to Liket and Maas (2015), it is best practice for the BOD to engage in self-assessments. The organization should use the results of self-assessments to inform the needs that the AB members can fulfill. For example, an organization that has a high level of existing clinical excellence and wants to grow may need operational knowledge, expertise related to scaling an organization, or competence with fundraising to support expansion. An organization with a relatively junior clinical team that is looking to shore up the quality of clinical services may need expertise from leaders in the field on specific areas of clinical service (e.g., residential services, severe problem behavior) or training and performance management. The leaders of the organization should make a list of the most important needs and use that list to guide selections from the available candidates.

The next step is to identify potential candidates for AB positions based on the organization's needs. If one considers the opportunity to serve from the perspective of the potential AB member, it is clear that an AB candidate who knows someone in the organization (i.e., first-degree connection), or who knows someone who knows someone in the organization (i.e., second-degree connection), may be a more promising candidate. Thus, the first member of an AB may serve as the connector to other board members and alter the probability that other members would accept. However, the process can also be successful even if the candidates are not known to the organization.

In addition to connections and skill sets that meet the organization's needs, the social and interpersonal dynamic of the board will help determine the success of the AB and the amount of effort involved in managing the AB. The first members of the AB should be highly personable individuals who get along well with people from all walks of life (i.e., select for social characteristics, as well as knowledge), as these early members will help recruit and enculturate later members. Once the first one or two members of the board are established (i.e., considered, offered, accepted), the remaining candidates should be considered in terms of the unique knowledge, skills, or connections that they provide, as well as their likely impact on the existing interpersonal dynamic of the group.

Everyone should go into this process knowing that it is not easy to find and ascertain the ideal AB member. Brown and Engle (n.d.) surveyed non-profit boards about selecting new board members. The respondents indicated that they used committees and other resources to identify board members. A majority (67%) of the respondents identified the need for improving the selection process. If

BODs are having these challenges selecting board members, similar challenges will likely occur when selecting AB members. It will not be easy, but once you find the right match, it is well worth it.

Managing and Engaging the AB

An organization developing an AB must consider the level of involvement to be committed to by the AB members, which must then be facilitated and managed by the person who chairs the AB (Gazley & Kissman, [2015](#)). An AB member's level of engagement may range from periodic (e.g., quarterly, yearly) phone contact to active, on-site engagement in ongoing activities. Leadership within the organization and the BOD should review the bylaws before selecting the AB. The AB role includes different purposes and levels of intensity that are either uniform for all members or different for various members based on their location, expertise, and willingness to serve. The individual selecting the AB member should ensure that the needs, guidelines, and expectations are known.

Once expectations are outlined clearly, it is imperative to ensure the experiences of the AB members match the expectations that were described; otherwise, AB members are likely to feel like their involvement is nominal (i.e., in name only), which generally proves unsatisfying for them. This section describes the various levels of involvement that may be requested of an AB member with corresponding considerations for each level of involvement. After identifying the AB members, the BOD or leadership should engage the experts among the AB and promote a culture of learning, both of which are common within high-performing boards (Gazley & Kissman, [2015](#)). Overall, the intent is to find balance in the amount or type of engagement so that there is mutual benefit for both the organization and the AB member.

Individual Remote Interactions

When AB members have been selected for their expertise (e.g., scientific ABs, expert clinical ABs), they are more likely to be geographically dispersed, which makes remote interactions appealing, economical, and less effortful. With this model of involvement, an AB member usually participates via phone calls or video calls with the coordinator of the AB and rarely, if ever, visits the physical location of the organization. The contacts could occur monthly, quarterly, semiannually, or annually. This type of arrangement is well suited to activities such as providing peer review or limited case consultation, advising on decisions and tactics for achieving specific upcoming goals, and assisting with activities requiring unique expertise.

One disadvantage of this level of involvement is that it limits the opportunity for all members of the AB to come together at the same time and in the same place to collaborate. Limiting group collaboration among AB members can be a substantial disadvantage to an organization because it prohibits the opportunity for creative brainstorming and thought sharing that often emerges when several experts are given the opportunity to assemble in person. Moreover, the opportunity for the AB members to collaborate with one another is often highly rewarding because this collaboration allows for additional learning opportunities and networking among professionals who may have otherwise not had the occasion to connect.

Group Meetings Live or Via Teleconference

Group meetings with multiple AB members promote engagement of the AB members and may provide the most benefit to the organization. Charan ([2005](#)) calls boards that are engaged and high performing "progressive boards." The AB members are asked to gather at the same place during the same time (that "place" may be an electronic meeting platform). These meetings usually occur at least once per year but could occur several times per year. This type of interaction may be particularly appealing if the AB members know each other personally or professionally and desire to interact with each other as much as they do with the organization.

Having all AB members gathered together allows dynamic interaction between the AB members and is well suited to tasks such as strategic planning, structured problem solving, conducting panel discussions on relevant topics to the organization, direct observation and intensive consultation on complex cases, and performing overall quality assurance functions based on direct observation and/or data review. The first three of these activities could be done via remote teleconference, if necessary, whereas the last two would be best suited to an in-person visit on-site. It is possible, but not preferable, to have one AB member attend via teleconference whereas others are live. The drawback of a single remote attendee is the barrier to equal participation in discussion and interactive activities. Often the in-person attendees are actively engaged with each other and may forget about the remote attendee unless there is a projected image of that person (see LeBlanc & Nosik, [2019](#), for additional discussion about this issue).

The primary consideration for a live, in-person AB interaction is the time and effort required by all of those involved. This type and level of interactive involvement require more effort on the part of the AB members, as they often have to fly to the site of the organization, learn how to use a new meeting platform, and/or adjust their schedules to accommodate other AB members. Because multiple schedules are being coordinated, this type of interaction requires facilitation and planning by the coordinator of the AB and usually must be planned months in advance. Thus, the coordinator of the AB must expend additional effort on scheduling and travel arrangements, potentially identifying the meeting dates many months ahead of time. This challenge is exacerbated when the AB members live particularly far from the site and have busy travel schedules (as many quality AB candidates do).

On-Site and Engaged in Ongoing Activities

When AB members are local and/or willing to participate on-site, there is the possibility of more frequent or ad hoc on-site engagement with the organization. The frequency of engagement could be as often as monthly but probably should not be more frequent than monthly to avoid placing undue time demands on the AB members. In addition, the activity engagement should remain advisory and enjoyable (e.g., attending social functions), as an AB has a purpose of “advisement,” not day-to-day decision making. Decision-making duties are reserved for BODs and the executives of the organization. Many organizations may find that some combination of the aforementioned types of participation is ideal and effective—that is, some remote events and/or individual consultations, as well as at least one annual on-site event.

Planning and Logistics

An organization that commits to gathering a group of AB members must dedicate its efforts to planning and logistics management for interactions with the AB members, regardless of the frequency or context of the interactions. That preparation consists of orienting AB members to the organization and the expectations for them, preparing for the meeting(s) and/or visit, conducting the meeting(s) and or visit, managing interpersonal dynamics, and managing the ongoing contributions of the board.

Orientation

Depending on when and how each member of the AB joins the organization, either a group orientation or an individual orientation to the organization should occur in order to acclimate each AB member to the purpose of the AB, as well as the mission, vision, and values of the organization. In an explanation of the purpose of the AB, detail should be highlighted regarding the organization’s expectations of the AB members, as well as the AB members’ expectations of the organization’s executive team members (or other organization members with whom AB members will be frequently working). If the AB member is not already familiar with the executive team members, introductions should be made, including each person’s position, roles and responsibilities, and prior experiences and background. It is unlikely that each AB member will be familiar with all other AB members; therefore, similar introductions among the group are also warranted. If AB members join the organization at different times, the introductions could include the duration of involvement with the AB and the types of contributions that have been made during that time.

A formal introduction to the organization should also occur during the orientation period. Specifically, the AB coordinator should share information such as the organization’s mission, strategic goals, organizational chart, and a summary of service offerings and locations. A tour of the organization can also help a new AB member feel comfortable with the surroundings and allow for a more concrete perspective about how the organization works and how the staff within the organization interact with one another. Finally, allow the opportunity for the AB members to ask questions and seek additional information about the executive team and/or the organization.

Preparation for Meetings

Regardless of the frequency of the AB meetings or visits, someone must take the responsibility for organizing the events. The organization should identify the person or people who will be coordinating the event; it is crucial that tasks and roles are clearly defined. The person might be the overall AB coordinator, or it might be another person in the organization who has exceptional planning skills. The person can then gather information and ideas regarding beneficial discussions and/or training leading up to the event. As the meeting approaches, the gathered ideas can quickly develop into a draft agenda.

The organization will get the most out of the meeting if the agenda includes specific discussions and presentations with advance notice about the topics, questions, and activities that will be presented to the AB members, as well as identified “chairs” to facilitate each discussion/presentation.

Some discussions will warrant the presence of all AB members, whereas other discussions will only need the expertise of a single AB member or a small subgroup of AB members. The questions developed for each discussion can address a wide variety of areas, including organizational structure, organizational systems, strategic planning, or client-specific issues (if applicable). See Appendix 2 for an example of an agenda. The agenda may also include trainings that the AB is asked to facilitate with a group of staff within the organization. If that is the case, those trainings should be clearly outlined in the agenda and the AB members involved should be consulted prior to the training in order to allow for adequate preparation time. To ensure the continued engagement of the AB, it may be helpful for the organization to prepare brief updates regarding occurrences and notable improvements within the organization since the last AB meeting, particularly those that relate directly to items in which the board participated.

The agenda should be finalized by the AB coordinator or chair and sent to each AB member in advance of the meeting or at the start of the visit. Receiving the agenda ahead of time allows each AB member to review the agenda and seek clarification as needed. Advance finalization of the agenda also allows time for additional internal preparation. Those preparations should typically involve identifying a person to facilitate each discussion (i.e., introduction of the topic, introduction of the team, starting and ending on time, facilitating discussion, and taking notes), allocating space and room for each event on the agenda, and preparing the technology (e.g., telecommunication for any remote participants and audiovisual equipment for trainings). In addition, preparation for the AB meeting should involve a variety of hospitality-related logistics.

The organization should plan ahead to ensure that each AB member has a positive experience resulting in motivation to continue contributing to the organization. These logistics involve making reservations and catering arrangements and issuing invitations to the organization staff who will be joining the AB. It may also be useful to identify activities or events that are entertaining and educational (e.g., touring the organization's facilities, facilitating a tour of a business in the area that works closely with the organization in some capacity). Additionally, the organization may choose to prepare gift baskets for each AB member customized to individual preferences (e.g., healthy snacks, favorite beverages, travel-related conveniences, gifts with the organization's logo). The commitment to the preparation of each AB meeting will oftentimes directly relate to the amount of value the organization receives during each contact; therefore, the preparation phase is a necessary component of the AB's success.

Conducting the Meeting

Having a designated leader to manage the agenda is crucial to ensuring that the discussions, questions, and trainings are carried out and beneficial. At the conclusion of the AB meeting, it is helpful to solicit feedback from members about their experience. One way to accomplish this is through the completion of a survey. Consider including the following questions: Which sessions did you find most/least beneficial? Was enough time allocated to each session (not too long, not too short)? Do you feel that your suggestions have been, or will be, followed? What suggestions do you have for future visits? Carefully review the feedback and suggestions that are provided and consider integrating that feedback into the next visit.

Conducting the Meeting Effectively

Again, each meeting can be conducted effectively by having a well-established and outlined agenda. All points should be clearly identified regarding whether the item requires the sharing of information, a general discussion, decision making, and/or action in some capacity. In addition to identifying the purpose of each agenda item, it should be established ahead of time which person will be leading each agenda item and the amount of time that will be allocated. Identify a person to monitor the time allotted for each agenda item and subsequently keep the team on schedule. It also prevents the last agenda item(s) from being unnecessarily truncated. Putting thought into these components of the meeting in advance will prevent the loss of time in the moment to determine these details. After the AB meeting has been well thought-out and planned, it is crucial to execute and implement the plan during the meeting.

Managing Interpersonal Dynamics

Each AB member will likely have a different style of communication, which may result in different strategies for participation in the meetings. It can be helpful to understand AB members' preferences for participating in the meetings and the context in which they prefer to participate. For example, some AB members will prefer small-group discussions and feel most comfortable being actively involved in a more intimate setting. However, AB members may not have a preference for a large versus small group and show a level of comfort no matter the context. These preferences can be learned and evaluated over time, or preferences can be ascertained at the start of the AB relationship.

Managing Ongoing Contributions of the AB

Although the individuals of the board are not employees of the organization, they reflect the mission, vision, and values of the organization. Consequently, each AB member represents the organization in some capacity through all personal and professional endeavors, for better or worse. Although each AB member may not be a BCBA, they will be expected to follow the BACB's *Professional and Ethical Compliance Code for Behavior Analysts* as it relates to the advisement and recommendations that they make as AB members. If the organization determines that an AB member's perspective does not align with this code, then careful review and analysis will need to occur to determine the benefit, or lack thereof, of keeping that particular member on the board.

Summary and Conclusions

There has been a rapid proliferation in the establishment and growth of new behavior -analytic organizations (e.g., provider organizations, technology companies, professional organizations), but not all of these organizations have ABs. This article provided guidance for organizational leaders who may not be familiar with ABs. The guidance focused on the structure and purpose of an AB, the benefits of having an AB, and the practical strategies for establishing and managing an AB. Throughout the article, we have provided two examples of the development and evolution of boards to illustrate various different uses of ABs based on the needs of the organization. Here we summarize some of the benefits that have been accrued by the organizations that have invested the time and resources to establish and maintain an active AB.

In summary, organizations can benefit in many ways from establishing ABs as long as the organization is in a reasonable position to leverage the efforts of the AB members. In general, an organization may benefit from having an AB if (a) it is a viable entity prepared for growth and quality improvement, (b) it has a sound governance structure and established executive team, and (c) it has sufficient resources to devote to the AB and the recommendations of the AB. The structure of interactions of the organization's leaders and AB members can range from infrequent to frequent, and live, on-site to remote. These structural characteristics such as frequency and location are important, but perhaps less important than the characteristics of the team that manages the logistics associated with establishing and managing the experiences and efforts of the AB. In particular, the experiences of well-planned and well-led meetings, fun and hospitality, and opportunities for meaningful input that translates into social impact are the reinforcers that sustain the engagement of the AB members.

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