

# Supporting and Co-Creating Meaningful Community Advisory Boards

Fostering Community Advisory Boards (CABs) With Shared Success

## Outline

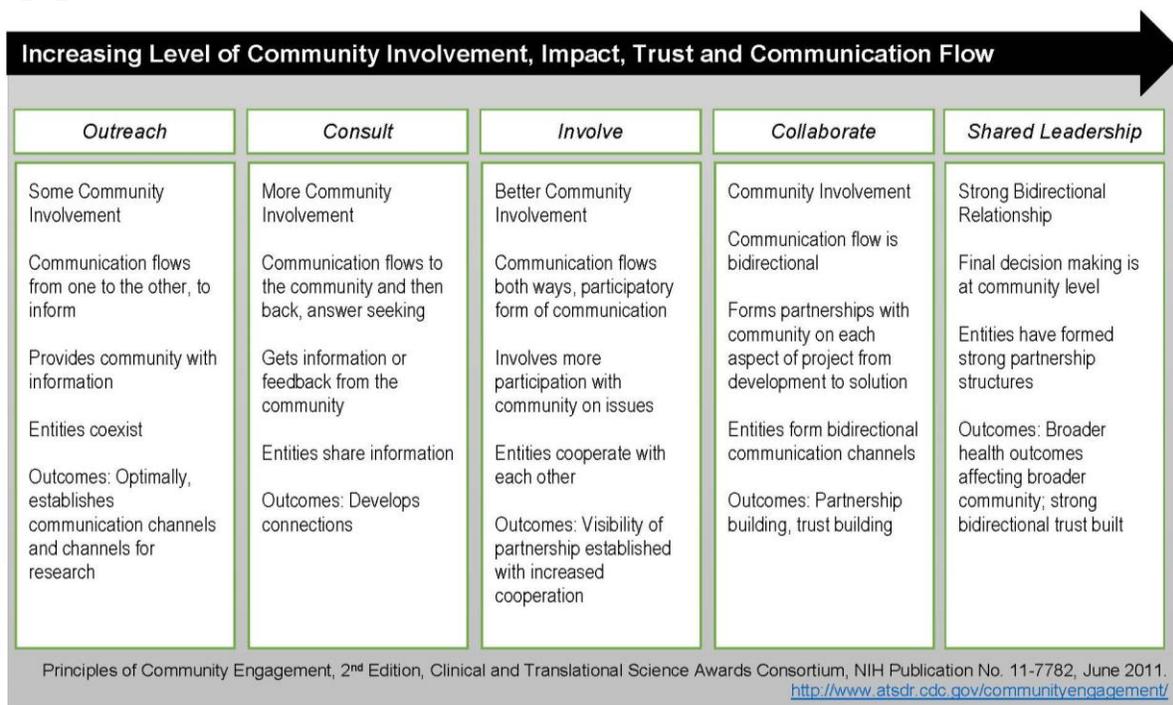
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# 1. Planning for a Meaningful Community Advisory Board (CAB)

## Community Engagement and Health Equity

- The Centers for Disease Control and Prevention (CDC) defines community engagement as “the process of working collaboratively with groups of people who are affiliated by geographic proximity, special interests of similar situations with respect to issues affecting their well-being” (Engagement, 2011)
- The Public Health Accreditation Board (PHAB) standards and measures state “community engagement also has benefits of strengthening social engagement, building social capital, establishing trust, ensuring accountability, and building community resilience.”

Community engagement should not be one activity, but rather embedded throughout your work. When thinking of engaging the community, a good place to start is thinking of what level of community engagement (community involvement, impact, trust, and communication flow) you are willing to strive towards. Be realistic in your organizational capacity or ability to evolve from the “norm.” The following visual from the Principles of Community Engagement, 2nd Edition<sup>1</sup>, illustrates the continuum of levels of engagement.



The National Resource Center for Refugees, Immigrants, and Migrants (NRC- RIM) is funded by the U.S. Centers for Disease Control and Prevention to support state and local health departments working with RIM communities. Learn more at [nrcrim.umn.edu](http://nrcrim.umn.edu). Last update: 01/29/2021.

If your goal is to move more toward community collaboration and shared leadership, a community advisory board is one effective option (and should not be the only way) in having community members helping guide the process of your work. Furthermore, having a CAB may move you on the continuum into “consult” and “involve” if they are serving as advisors, but keep in mind there are many strategies to authentically engage communities in a manner that promotes a more equitable engagement.

- Resource: “Principles of Authentic Community Engagement” – Minnesota Department of Health<sup>3</sup>
- Resource: “Supporting Health Equity Through Community Engagement” – Minnesota Department of Health

From the MDH Center for Public Health Practice<sup>4</sup>: When thinking about engagement that advances equity, think about these reflective questions:

- What partners do you engage to advance public health?
- Who influences decisions made about public health policies and practice?
- Would populations experiencing health inequities describe your department as working with them to find solutions, or offering solutions to them?

### Community Advisory Boards: Where to Start?

Community Advisory Board (CABs), when involved in research “often serve as a source of leadership in the partnerships of community-based participatory research (CBPR) and provide structure to guide the partnership's activities....CABs provide an infrastructure for community members to voice concerns and priorities that otherwise might not enter into the researchers' agenda, and advise about suitable research processes that are respectful of and acceptable to the community.”<sup>5</sup>

If your organization decides a CAB would be helpful in doing more community-grounded work, there is a lot to think through in advance of seating the board. It is critical to start the process by putting in some effort on strategic planning with regards to a CAB, including considering the following questions:

- What are your institution/ organization's goals for this CAB?

- How flexible can you be in adding future CAB-identified goals that fall in line with the general scope?
- Are there rules or processes in your organization that will affect the ability for the CAB to make decisions, or areas they will not have a final decision-making power?
  - If so, it is important that you can communicate this to the CAB at the outset.
- Is your organization willing to balance or share power with the CAB? What level of power would the CAB have?
  - Be realistic and have necessary discussions with leadership within your organization.
- What resources are available for this engagement (funding, staff time, in-kind support)?

Additional questions to consider:

- **Relationships and trust:** What relationships do you already have within the community? Has trust been established in existing relationships, if any?
  - Who can you confer with to see if a CAB for this work would be welcomed by the community, and what considerations might be helpful?
  - Also important to consider how engaged the people you have relationships with are in other work. Some agencies and organizations tend to partner with the same community stakeholders and leaders for many/all projects. Engaging in new partnerships is important for organizational growth.
  - Consider what would make a truly beneficial relationship. How would the CAB members you'd recruit benefit from this collaboration, beyond, ideally, a benefit to their community.
- **Experience and passion for the work:** Who in the community is passionate and/or has experience in the topic?
  - One strategy is to work with those in the community already active in the proposed area of work, rather than those community contacts you already partner with or routinely engage. Your contacts within the community can be helpful in identifying community champions in the proposed area of work.

Take time in the process to discuss and reflect on these questions. Collect the answers into what you can help you start defining the scope and purpose of the Community Advisory Board. This will be helpful in terms of recruitment as well as setting the table for a meaningful CAB.

## 2. Setting the Table

### Reducing Barriers to Participation

Community members are balancing a variety of other responsibilities that take priority: family, work, other responsibilities in their respective communities, self-care, and other interests and hobbies. Some of the community members that could give the most effective and helpful guidance to the project might also be those who have the greatest demands on their time and other barriers to participation. The following are some strategies to assist the potential board members and reduce to barriers to participation:

1. **Honorariums:** Community members are busy, and a modest monthly honorarium helps them by honoring their time, experience, wisdom and expertise. They are participating on their personal time so this would help offset money they could have earned with other work, and defray costs that could be incurred due to their participation.
2. **Travel/Mileage Reimbursement:** For those who would be driving or taking public transit, consider covering the cost for travel to meetings and other project-related activities by providing mileage reimbursement or public transit costs. For those with more transportation barriers, consider providing the transportation necessary to ensure they can participate (e.g. carpool, taxis, shuttles).
3. **Child-Care:** If child-care is needed for the CAB member to attend the CAB meetings, consider offering to pay a standard amount or reimburse for child-care cost or offering on-site child care.
4. **Meeting Location:** Video conference meetings can be helpful to reduce the time needed for involvement, but can also provide their own challenges in creating rapport/cohesion. If the group will meet in person, a more permanent meeting location can be decided upon once the CAB has finished recruiting, but letting interested candidates know the general region where you plan to meet can let them know if it is feasible in their schedules considering travel time. Consider picking a location central to the community, not your agency's location or what is easiest for you as the organizers.

5. **Providing food and refreshment:** Community members and leaders are busy, and giving them one less thing to worry about before or after the meeting is helpful. It also is a bridge to help develop relationships and rapport.
6. **Offering ASL and Spoken-Language Interpreters:** Offering options for those who could benefit from the presence of an interpreter for either ASL or a spoken-language interpreter can help improve accessibility and recruitment of a more diverse group.
7. **Listen to those who you are recruiting and other partners:** What other barriers do they identify for that particular community?

## Recruitment

**Internal Personnel:** It is important that the right staff engage and work with the CAB. Questions to consider include:

- What internal staff at your organization already have experience and relationships with the community(ies) you want to work with?
- Which staff have community engagement experience that would serve as good liaisons for the CAB?
- Who can be a consistent, accessible presence for the CAB?
- Who can bring enthusiasm for the topic?
- While the work is serious, who can help bring some fun, levity, and ability to foster relationships to the group?

**CAB Members:** There is a lot to consider in forming the CAB, from size of the group to the makeup of individual demographics. Creating a representative CAB and a welcoming, safe and productive environment is a challenge that can require reflection and honest and sometime hard conversations. Members of the community can be very helpful in thinking this through before you start recruiting. Some questions to consider:

- How diverse is the community you want to work with? What considerations are key to getting a broad representation of the community?
- Consider a balance of gender, ethnic groups, socioeconomic status, occupations, and key religions from the community.

- Do you want leaders from the community who guide the actions of Community Based Organizations (CBO) and faith institutions? Alternatively, do you want members of the community who are not strongly tied to an organization? Or both?
- Can you have members who are English Language Learners and may need interpreters participate? If meetings must be held in English, make that clear in recruitment.
- What accommodations can you offer for people with disabilities to participate?
- What is the estimated number of hours that it will take for someone to participate? In and outside of the meetings, if you hope to engage them outside of the meetings as well (for example, reviewing and providing feedback on documents).
- Resource: [Community Engagement Toolkit](#), Collective Impact Forum, has helpful tools including one on "Who's at the Table."<sup>2</sup>

Once you have identified the kind of people that you want to recruit, begin to develop a list of prospective members.

Consider meeting with prospective members in person. Be prepared to provide background information including history of the group, project timeline, what they have been or will be working on, who the other members are, how the group works together, etc. Also be prepared to share more logistical information including how often the group will meet, where meetings are held, estimated number of hours of involvement per month, and how long you would like to members of the board to stay on at a minimum.

This same type of information can be laid out in an invitation letter or call for applications. The more information you can provide, the more likely you will get the people who will be the best fit for this. This may be the people you meet with or others that they refer to you.

### 3. Charting a Course for Success - Together

#### Ground Rules

Ground Rules is another component that can be co-created with the CAB to promote respectful, productive board meetings. It can be simple with only a few guiding principles or more exhaustive, depending on what the CAB (and organizers) feels is important to set the group on a path for success.

Part of the first meeting could be devoted to brainstorming as a group what values and “rules” the group would like to operate. Have a couple to offer for consideration if it is quiet or CAB members take a little time to think and offer their own suggestions. It is important to create a safe space where people feel respected and are comfortable sharing their thoughts.

Ground Rules can be short or exhaustive depending on the group, but some overarching goals can be to foster collaboration, inclusion, respect, and ideas.

## Board Expectations

It is beneficial to all parties to create a framework for community advisory board operations. Spend time with the CAB to further develop the scope and purpose – it will be more effective and resonate with the CAB if it is co-created. Additionally, devoting time defining expectations for both sides is important so everyone can hold each other accountable in a bi-directional way.

- **What expectations does the sponsoring organization have for the CAB?**

Examples provided below:

- Respect ground rules set by CAB
- Provide input on communications with community (consent forms, educational materials, preferred ways to disseminate information)
- Educate study team on historical challenges, politics, and community-specific nuances as project progresses
- On topics where feedback requested, share with networks to gather additional input
- Help publicize community events and opportunities

- Attendance at meetings or advance notice given for an absence. The CAB can decide what steps should be taken when there are missed attendance. *For example, in one CAB, they decided the facilitator would contact them after one missed absence without advanced notice. If two meetings were missed in a row by a member, the CAB asked that the facilitator contact the member and see if they are unable to meet the expectations and to consider if they needed to step down.*
- **What expectations does the CAB have for the sponsoring organization?**  
Examples provided below:
  - Prompt communication of schedule, events, and upcoming opportunities
  - Regular updates on study progress and challenges
  - When CAB feedback requested, report back how input was used or why a change was not feasible
  - Increase their awareness of topic area and related resources
  - Conduct socially responsible research (if applicable)
  - Shared decision-making process and voting, when applicable. This shared decision-making framework can be applied to a variety of efforts

A charter/memorandum of understanding (MOU) that records all the expectations and ground rules enable members to reference back and adhere to the mutually agreed upon framework. This also helps or the group to hold themselves, each other, and the sponsoring organization accountable throughout the course of the CAB's existence. It is recommended you each member signs and agrees upon the charter/MOU.

## Leadership & Facilitation

Another piece to consider is who will be serving key roles for the functioning of the CAB. Roles can vary depending on what works best for the particular group, as any of the following (and other configurations) have been used successfully:

- Facilitator from the sponsoring organization and all the CAB members have an equal say in decisions
- CAB member serves as the chair
- Co-chairs, one from the sponsoring org and one from the community or both from the community

- Rotation of who is facilitating/leading meetings

Find what works for your CAB based on discussion with the CAB members and project staff. Consider term limits as a precaution in case challenges arise since they can help create a natural transition.

## Logistics

There are many other logistics that can be decided either during the “forming” stage of the CAB, during the pre-planning phase, or both. Note that ownership by the group will depend on how much decision making the CAB has. Some logistics to consider, with the CAB, if possible:

- What time should meetings occur? What will be realistic in terms of people getting there on time (if in-person) from their prior commitments?
- Are there days and/or times that do not work well or work better for the group? There may be religious, occupational, and community considerations.
- What should the time commitment be? Remember to take into account that people are participating on their personal time. How long should the meeting time be to be effective but also not taking too much of their time in the day outside of their regular work?
- Who from your organization can take notes for the meeting? How will they be shared?
- Who will facilitate the meeting?
- If the meeting will be virtual, what can you do to build rapport and relationships? How do you preserve some of the time that would have gone towards socializing if the meeting had been held in person?
  - Meetings held virtually does allow people to type in comments in the chat, which can be a nice option for those who have difficulty speaking up or are more introverted.
- If the meetings are in person, what can the sponsoring organization offer in terms of food and beverage? What type of food would the CAB prefer? Remember to take dietary restrictions into account and holidays that may require fasting or abstaining from meat.

- *Example: For a CAB that serves the West African diaspora community, members wanted to have the dinner to be more culturally relevant at each meeting. They were able to find West African caterers who could provide the meal within the budget limits and rotated between a variety of West African caterers.*

## 4. Maintaining a Successful CAB

### Ensure Open Access to Information

#### *Accessible Drive/Portal*

It is important that CAB members have access to information about the project, background, timeline, goals, milestones, and contact information of all involved. Consider creating a portal/shared drive where those with access can find all the relevant documents and information.

#### *Progress reports to CAB*

The CAB needs to be kept informed as the work progresses. In addition to making sure they have access to documents, consider providing a progress report or talking through updates as a standing agenda item. Include follow-up on their efforts and guidance provided, but also give them a broader sense of the progress of the work they may not be as directly involved in. They are ambassadors for the project and a broader knowledge can help them better guide the work you are asking them to help with.

### Overcoming Challenges

#### *Lack of understanding by the sponsors*

Organizational staff can take it upon themselves to improve their interactions with CAB members by deepening their knowledge and understanding of the history/culture of the group as shared by the CAB members. Members of the sponsoring organization/institution have a responsibility to learn about the community and understand CAB members in the context of their social history or culture. Staff should be open to asking questions, seeking clarifications, and accepting constructive feedback rather than working with assumptions. CAB members' efforts to point out mistakes or areas of improvement should be appreciated and welcome, as builds a more equitable and welcoming environment.

#### *Strong Personalities*

Dialogue and process can sometimes be derailed if there are individuals who tend to dominate the conversation by interrupting others, taking the conversation into unrelated tangents, being the loudest voice in the room, and other ways that can silence others. There should be a process in place for when this happens because you will need strong facilitation techniques to counteract this. The facilitator needs to be very intentional about creating space for all to share and some potential solutions include:

- Changing the pace to a round robin so everyone has an opportunity to speak
- Redirect conversation
- Reminding everyone about the mutually agreed upon Ground Rules
- Gently remind the stronger personalities to allow others to be able to speak
- Some of this also can be resolved by the other CAB members speaking up.
  - If a community chair is leading the CAB, potentially strategizing with them “off-line.”

The fallout from not dealing with this over time is the potential of members quitting if they feel that their voices are not being heard.

### *Continuing Momentum*

Sometime attendance can drop off over time, or interest/attention by some members can waver. This is understandable since this is not a one-time event, but rather a continuous engagement over time. A few strategies to counteract this include:

- Make sure you are fostering the relationships in the group, among the members as well as your staff. Devote time at the beginning of the meeting to share and build relationships.
- Having a frank conversation with an individual to see if they are still committed or would they prefer to step down to allow someone else to take their place
- Bring in guest speakers to highlight a different aspect of the work, or to share knowledge with the CAB and study staff on a particular relevant topic.
- Feature members as speakers or supporting them to lead specific agenda items.

- Making it possible for members to bring guests, when appropriate. Bringing in new voices can change the dynamic of the group which adds add new energy and ideas.
  - For planning purposes and time to hear all voices, consider asking the members to contact the organizer in advance if they plan to bring a guest.
- Give the members opportunities to highlight their involvement to others, from speaking/presentations to meeting with partners.
- Conscious effort should be made to engage CAB members in brainstorming ideas, seeking their opinions on actions that need to be taken and thoughts on aspects of the project they may not be directly involved in.
- Willingness to evolve and adapt the work and goals of the CAB in sync with the feelings of the CAB.

## Sharing the Stage

Be intentional about who gets credit for the products of the shared work. As CAB members help guide the work, they should also be getting some of the credit, recognition, and networking opportunities that can come from it. Think on ways to do so, below are a few ideas:

- Panels and presentations
- Media interviews
- Meetings with funders
- Making a rule that there will be CAB members as co-authors for any manuscripts published
  - *Example: For one CAB, two members were invited to be co-authors to each manuscript being produced, based on their interest areas.*

## Capacity Building and Shared Learning

Another important strategy for maintaining and strengthening a CAB is through capacity building and shared learning. This is a way to build the strength and knowledge of members and study staff in a shared educational opportunity that benefits all involved. Some considerations include:

- Identify topic areas based on the goals of the project as well as the goals/needs of the CAB members. Topics that address both should be highest priority.
- Based on capacity, encourage CAB members to bring others from their respective community organizations they may be affiliated with or representing
- Your staff should be full participants as well – everyone is an equal learner
- Contract or partner with workshop creators/facilitators that are community grounded.

Examples of capacity building/shared learning:

- Workshop on creating focus group guides, hosting, facilitating focus groups
- Questionnaire development / Surveying in the Community
- Risk communication
- Monitoring and evaluation
- The power of stories
- Community needs assessment
- Policy reviews

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