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Policy Advisory Groups

What is an advisory group?

¶ An advisory group is a collection of individuals who bring unique knowledge and skills which complement the knowledge and skills of the formal board members in order to more effectively govern the organization.

¶ The advisory group does not have formal authority to govern the organization, that is, the advisory cannot issue directives which must be followed. Rather, the advisory group serves to make recommendations and/or provide key information and materials to the formal board of directors.

¶ Also referred to as: advisory board; advisory panel; reference group; advisory committee; advisory consultation committee

¶ The advisory group can be standing (or ongoing) or ad hoc (one-time) in nature

Why form a PAG?

There are numerous reasons for why a research project/department/team would want to coordinate an advisory group:

¶ To provide strategic direction and guidance on the work programme

¶ To provide independent, external and policy-orientated advice

¶ To broker new partnerships and identify potential funders

¶ To raise the status, prestige and visibility of the project/department/team

¶ To act as a sounding board for the project/department/team to ensure it is academically sound but also relevant to the real world

¶ When it's apparent that a major, current issue/challenge or program/project is too complex and/or numerous to be handled by the internal team

¶ When the time and resources required to properly coordinate a PAG is worth the benefit

When not to form a PAG

¶ It seems like ‘a good thing to do’ and would look great in the eyes of your funders and commissioners

¶ Staff have do not have the time or capacity to coordinate the PAG

¶

Membership diversity

¶ Having a PAG formed entirely of senior academics sometimes results in people not having the time to read the background material or engage with the work beyond an annual meeting. If you intend to have more engagement with your members (i.e. sending ad hoc documents for review or comment, organising events, providing advice, etc.) you might want to consider involving early career researchers (ECRs).

¶ ECRs are at the heart of research and development. ECRs are more likely to have the capacity to get involved and provide advice, as opposed to senior colleagues who often have many demands on their time. Additionally, ECRs are often the researchers who implement the recommendations and conduct the research so it is important to get views beyond senior management.

¶ Recruit members with an eye to diversity (i.e. go beyond the ‘usual suspects’), but avoid tokenism (i.e. only making a symbolic effort to give the appearance of sexual or racial equality) as much as possible.

¶ It is crucial to acknowledge that people from under-represented groups are often disproportionately asked to participate on boards and panels compared to white counterparts, which means they have less time to put towards their own research and projects.

Recruiting members

¶ Work with the internal project team to identify a handful of people to initially approach

¶ Then ask these people to leverage their networks to invite additional members. This makes the members feel more invested in the group.

¶ Generally accept expressions of interest in the form of a short statement for why they want to join the PAG and their relevant experience

UCL Advisory Groups – Case Studies

Bartlett School of Environment, Energy and Resources (BSEER)

Department/Team	Bartlett School of Environment, Energy and Resources (BSEER)
Name of Group	Partnerships & Advisory Board
Who coordinates	Executive Assistant to the Director of BSEER
Purpose of the Group	[redacted]

	¶ However, in the future, ideally would cover a breadth of insight by including post-docs, other early career researchers, people in practice and people with lived experience ¶ Members are invited by the Unit Director with input from the Principal Investigators from each of the work streams
Chair	¶ One of the members acts as the Chair ¶

European Institute

Department/Team	European Institute
Name of Group	Advisory Board
Who coordinates	Executive Director, Head of Academic Programming and Head of Public Policy and Partnerships
Purpose of the Group	To provide strategic advice (in the context of Brexit), broker new partnerships and identify potential funders. To raise the status, prestige and visibility of the European Institute.
Activities	¶ Door opening function i.e. looking for speakers, brokering contacts ¶ Identifying and approaching potential funding donors ¶ Advising on topics (i.e. for events, reports, interviews) or potential partners ¶ Developing lists for participants in roundtables, speakers at events or conferences ¶ Chairing events
Members	¶ 15 high level/senior academics, officials and NGO leaders

As people start replying, keep track in your Participant tracker. Update the spreadsheet as soon as you hear back from someone so that their emails don't get list. Make note of whether they can come or can't. If they can't, reply to ask whether they have a colleague they would suggest inviting in their place. If they can come, forward them the diary invitation with the login details and tell them a full programme booklet with participant bios will be

Make the chair a co-host in case something happens to your connection. Have the chat and participants tabs open so you have mission control. When participants enter, change their name so it shows as ‘first name last name, company.’ As the host, you can just click on them in the participant list and rename them. If there are observers, ask them to mute with videos off, but invite participants to leave video on. Select the option ‘hide non-video participants’ so that you don’t have to see black boxes.

7. Transcribing the Discussion

To get closed captions live on screen: Start meeting > More actions (3 dots) > Live transcript > Enable auto-transcription. Transcribing the event is a good idea so that you have a full transcript of the discussion that you can use to help you with the outputs.

Transcribing a meeting through Zoom

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8. Immediately after the Roundtable

Send an email to all the participants thanking them for taking part, telling them they can get in touch with you if they want to be introduced via email to any of the other participants, and telling them the timeframe to expect the outputs and whether they'll be asked to review any documents.

9. Outputs

Outputs should be co-produced with the Chair and roundtable participants. If you create a policy brief or summary document of the discussion, send drafts to the Chair and participants for their review and sign off. Consider working with participants to develop creative outputs, such as blogs, video case studies, infographics etc.

Policy brief

Writing a policy brief or commentary of the discussion is highly advised as this will summarise the discussion, draw out key points, policy recommendations and research gaps. I like to structure this with an introduction, executive summary, main text separated into the different discussion questions, conclusions, list of participants. Use the Chatham House rule i.e. nothing that is said is directly attributable back to an individual).

View examples of the AI & Policy Roundtable Policy Commentaries.

Blog

Blogs are a good way to communicate findings from the roundtable in a more accessible and digestible fashion. There are a number of different approaches to take for the blogs, but one that I've used recently is a 'Q&A' style blog where I interview the chairs. I use otter.ai to transcribe the 'interview' and then edit the transcript into a blog.

Documents

Document G. Template policy commentary
Document H. Template Q and A style blog questions

Top tips

Eventbrite has consolidated a list of top tips for a successful roundtable discussion:

1. Define your goals – what problem are you addressing? What will you do with the information from the discussion?
2. Plan your room – whether virtual, in-person or hybrid
3. Carefully craft the invitation list and choose a strong chair
4. Prepare a brief for the chair and other facilitators
5. Set an agenda
6. Record and share results

Additionally:

- Start each discussion section with a short introduction from one of the participants to help to set the tone and get the conversation started
- Start from a position of inclusivity and accessibility i.e. captions, describing images (alt text), use accessibility tool in Powerpoint to see if screen reader could read
- Have a notetaker and/or using a live transcription software like otter.ai or the in-built transcription functions within Teams or Zoom