Starting Your Staff Advisory Council

A Quick Start Guide
offered by the University Staff Advisory Council
What is a Staff Advisory Council?

A Staff advisory council represents the voice and perspectives of staff throughout the organization. Based on their unique makeup, these councils may perform various functions supporting their mission.

Benefits:
- Cultivation of belonging, shared identity, and well-being, fostering an ideal workplace.
- Building a spirit of community among staff.
- Providing a platform for idea exchange to enhance the work environment.
- Promoting continuous improvement and fostering student success.

Advocate for staff welfare and development
- Engage in vital discussions on staff and campus matters by exploring issues, policies, and practices.
- Promote professional fulfilment and personal growth in the campus community.
  - Assist with onboarding and networking.
  - Offer mentorship opportunities.
  - Host events that focus on staff wellness e.g. Staff town hall, staff engagement social,
  - Increase recognition opportunities e.g. staff awards, years of service
- Promote Diversity, Equity, Inclusion, and Belonging initiatives.

Cultivate partnership between staff and campus leadership
- Advise and assist the decision makers, e.g. the human resource group or executive leadership to align with mission and strategic directions of the unit/department/campus.
  - Explore concerns, policies, and practices relevant to your staff and campus community.
  - Offer input and recommend updates to existing policies.
  - Propose new policies, projects, or initiatives.
- Serve as conduit between leadership and staff to enhance communication and collaboration. e.g. hold town hall meetings, hold surveys, disseminate information
- Collaborate with other college and campus unit advisory boards to share knowledge and experience.

As members of the University Staff Advisory Council at University Park, we encourage you to think about creating your own council, one that can work together with your human resources representatives on important issues that affect staff, students, and the university itself. We have prepared this guide to give you an idea of what a staff advisory council is, what it does, how it is formed, and how you can gather support for the project.

Why Form a Council?

Research demonstrates that enabling employees to freely voice their concerns boosts retention and performance. Establishing a staff advisory council cultivates openness and shared responsibility, leading to a more engaged, productive, and adaptable workforce.

References:
- SHRM: Employee Advisory Committees Promote Benefits Buy-In
  https://projectionsinc.com/employee-advisory-group-employee-engagement/
- https://projectionsinc.com/employee-voice/
Determining the Need

Now that you have defined what a staff advisory council is, why it is valuable, and some of the benefits, it is now time to begin organizing a proposal for why your campus/college/unit should support the creation of a staff advisory council.

Begin thinking about how to professionally ask your campus/unit/college leadership for support in establishing a local staff advisory council. This approach is two-part:

1. Conduct a needs assessment so that you have data to support your ask.
   a. Conducting a needs assessment is a very helpful tool whether you collect your own data, or utilize data provided by University Staff Advisory Council (USAC), if available.

2. Draft a written proposal, utilizing the outcomes of your needs assessment, to submit to your leadership.
   a. This written proposal allows you to ask for support while proving (or determining) the need for a staff advisory council with a data-driven approach.

To conduct your needs assessment, you must consider the role you play, the role of the potential staff advisory group, how to connect with USAC, as well as how to best support the overarching University values and mission. While this step may seem time-consuming, please consider the return on your investment and intentionality. Taking the time to conduct a needs assessment will strengthen your ask to leadership as it reflects your level of commitment to properly representing your local campus/college/unit through a data-driven proposal.

https://asana.com/resources/needs-assessment

1. Understand the needs and requirements
   • Demographic overview
     o Speak to your campus/unit/college leadership to learn about
       • Priorities
       • Campus/unit/college strategic goals
     o Speak to staff to learn
• How they want to be supported
• How they envision themselves supporting strategic goals and leadership priorities
  o Campus/unit/college mission statement
  o University mission statement and values
  o Presidential goals
  o University Staff Advisory Council Mission and Vision

2. Measure and allocate resources: Create a team
   • Are there one or two other people that can help you come up with your plan to create a staff advisory council?
     o Consider the role each person can play

3. Internal and External data collection is important
   • Survey your local community through engagement opportunities, drop-in virtual sessions, email blasts, create flyers to bring awareness of your efforts
     o Share the definition of a staff advisory council
     o Ask how your community would like to be represented
     o Ask about pain points and partnership opportunities
     o Consider the types of resources your community could benefit from
     o Create surveys and protect the identity of all respondents.
   • Consider reaching out to USAC for broader data to connect local themes to overarching themes at the university

4. Analyze your data for patterns and themes
   • Outcomes from local demographic responses to your promotional efforts
   • Names are not necessarily important, but it is important to consider whether the responses are from students, staff, leadership, faculty.

5. Socialize your goals and gain feedback from your community
   • Consider top 3-5 items and use them for goal setting
   • These 3-5 topics should be specific to your college/campus/unit
   • Consider how these 3-5 topics support the local mission as well as the overarching mission vision of the university

6. Reflect on what you’ve learned through data collection and analysis then create a plan to use your data
   • Prepare your report and create a presentation for your leadership
   • Keep your slides clean
   • Practice your delivery
   • Speak to the topics, do not read the screen
   • Consider your word choice and key messages
     o Make sure to define uncommon terms
     o Speak to the priorities of your leadership strategic goals
   • Allow time for Q&A
   • Provide mechanism for questions to be submitted as an afterthought
   • Have a pre-drafted ‘thank you’ message, again, sharing the follow up mechanism or email.

With a completed needs assessment, you can now confidently draft an official proposal to submit to your unit leadership requesting their support for creating a staff advisory council.

The sections of your written proposal should include:

• Cover page
• **Purpose** of the proposal
• **Who** you intend to represent?
• **What** you intend to achieve?
  o **What** is your mission?
• **Why** do you feel a staff advisory council is needed
• **How** will the staff advisory council bring value
• **Process for data collection** (high-level)
  • **Data outcomes**
    o Use charts for quantitative data
      ▪ Consult [Penn State Accessibility](#) to ensure your charts are viewable to all audiences
    o Share the goals derived from your data collection!
• **Support** – this is where you let leadership know how they can support you while you support them
  through supporting your staff
  o Share what your community needs from leadership based on the data collected
  o Share how you can support your community base on what the data collected
• **Resources**
  o What type of resources (monetary, facilities, etc.) do you feel are required?
  o What about those that are “nice” to have?
• **Communication strategy** - how will you communicate to promote your advisory council? How will you bridge communication and follow-up/follow-through with leadership and staff?
• **Conclusion**
  o This is your opportunity to make a closing statement
    ▪ make it clear
    ▪ connect to PSU mission/vision
    ▪ connect to USAC mission/vison
    ▪ show how you will elevate your local mission, vision, and strategic plan

**Once your proposal is final,**

• Schedule a meeting to present your official proposal to leadership.
  o Make sure to follow all scheduling protocol!
  o Consider appropriate time for presentation and Q&A
• Attach the report to the invite as a read-ahead opportunity.
• Make yourself available for questions ahead of the meeting.
  o I recommend allowing one week so that you can prepare and allow your leadership time to read and process the information prepared.
• A nice bonus is to make a slide deck of 3-6 slides providing the most important facts to speak about during the meeting.
• Make sure you have a thank you email drafted and ready to send out following the meeting.

**Approved? Not approved? No problem!**

• If you are approved to create your staff advisory council, seek ways that you can get more use out of your needs assessment!
  o Use the data to set measurable goals
  o Use the contact information to create a listserv or email group or Teams group – build a network!
    ▪ Consider a shared email address, SharePoint, Teams space
    ▪ Consider promotional branding – letterhead, email signature marks, tagline, presentation
templates for slides, name tags
  - Consider email signatures for all members

- If you do not get approval on the first proposal from leadership, don’t stop there!
  - Can you utilize this data to assess your growth?
  - Can you find a way to continue to engage the community and strengthen your need for an advisory council?
  - Reach out to USAC for support and guidance!

**Useful tools and resources:**

- Penn State Survey Research Center: [https://survey.psu.edu/](https://survey.psu.edu/)
- Google Forms for Polls: [https://forms.google.com/](https://forms.google.com/)
- Qualtrics: [https://pennstate.qualtrics.com](https://pennstate.qualtrics.com)
- Penn State Accessibility: [https://accessibility.psu.edu/](https://accessibility.psu.edu/)
- Needs Assessment Article: [https://www.indeed.com/career-advice/career-development/needs-assessment](https://www.indeed.com/career-advice/career-development/needs-assessment)
- USAC: [https://hr.psu.edu/usac/about-us](https://hr.psu.edu/usac/about-us)

**Educational Efforts**

If interest in the formation of an advisory council seems low...don’t panic! It may simply point to a need for some additional educational efforts. The right messaging can help increase understanding about the advantages, impact, and opportunities that an advisory council can bring. Referencing successful peer councils already established in your organizations may help to draw parallels to your area’s specific needs. Testimonials or letters of support from chancellors, human resource representatives, or staff advisory council members can also help to generate interest. Be sure to express the benefits which may include:

- A forum to address concerns
- Better employee relationships
- A more productive workplace

**Requesting Support and Sponsorship**

If you have established a need for an advisory council through your discovery efforts, the next step should be to collect official backing for the project. Make your supporting data available and be sure to set clear expectations throughout this process on what sponsorship entails. Depending on your potential goals this may include anything from dedicated staff time to a financial commitment. A letter of support from your Human Resource representative accompanying this request may be beneficial as well.

Deciding to conduct a needs assessment and written proposal is beneficial for this reason.

We recommend reaching out to those with a high degree of influence in your organization. Depending on your campus, some examples may include:
• Your Dean or Chancellor
• Associate/Assistant Dean(s)
• Unit Executives
• Faculty Senate or Local Faculty Council Body
• Prominent alumni or alumni groups

Links and other resources can be found in the USAC Community and Engagement Group located in Microsoft Teams.

Choosing Potential Members

Through your needs assessment, you may already have a few leads to pursue for your initial membership. Try reaching out to your colleagues who have directly expressed a desire to belong to a staff council, or who have discussed the need for more staff representation in university decisions. Be sure to leverage any campus/unit wide communication channels that are available to you and encourage others to pass your message on. Word of mouth helps here, and you’ll want your communication to be inclusive…just like your council.

Councils should be comprised of people from different backgrounds and with varying experiences to encourage healthy discussion and broad perspectives. Strive for a diverse team. The benefits for members often include personal and professional growth, opportunities to expand their network of relationships, stretch goals for yearly performance evaluations, and leadership roles at any level.

Effective teams require members who are passionate, respectful, and open minded. There is also a very real commitment of time and energy to consider. Potential members should discuss this with their supervisors prior to accepting additional responsibility. A formal application process may also be implemented which can include this key step. (A template for a standard application packet is available for your use in the USAC Community and Engagement Group in Microsoft Teams)

Establishing Structure

First meetings tend to be “get-to-know-you” types of gatherings. However, you should still have an agenda and an objective to start things off on the right foot. Here are a few suggested actions and talking points that will help communicate the value of the council and help to set some expectations for the initial meetings.

Define your Mission
• What will be the scope of your organization’s effort?
• What issues are your team members prepared to tackle?
• Work to align your SAC’s mission with that of your organization and USAC at large.

Establish Objectives
• Is the main function of your council to keep stakeholders informed and engaged, or would it be helpful to have a small group of people with specific skills and connections to help you get things done?
• Define short term and long-term objectives. Quick wins can help build momentum!

**Review Membership and Representation**
Carefully consider if there is representation in key areas:
• Diversity of opinions
• Diversity of experience
• Balance of identities, including but not limited to culture, race, age, sexual orientation, gender identity/expression, etc.
• Staff (exempt and non-exempt) (full and/or part-time staff)
• Representation across departments
• Size - there is no ideal size, but advisory councils generally contain between 10 and 15 people

**Group Processes and Expectations**
• What will be the structure of this SAC?
• Will your SAC establish sub-committees?
• Will your SAC create an executive council?
• What will be the voting processes for this SAC?
• When and where will you meet and at what frequency?

**Discuss Connections**
• Members of your group will already have connections to key personnel who may help sponsor and support your initiatives – leverage your resources!

**REMEMBER:** An advisory council is more than a format for discussion. Your SAC should be looking for ways to act on prominent issues, and to guide your governance structure and overall processes.

Be sure to record any action items that the council wishes to pursue so that you can track your progress and the positive impact you are making.
Setting Goals and Evaluating Impact

It is important to define concrete goals to determine where you want to go as a local Staff Advisory Council, and to help define what success looks like for your team. Without concrete goals, you are aiming in the dark trying to improve.

Consider beginning with one or two well-defined SMART goals. SMART goals are a way of setting objectives that are clear, trackable, and achievable.

An example of a SMART goal statement might look like this: Our goal is to [quantifiable objective] by [time or deadline]. [Key players or teams] will accomplish this goal by [what steps you will take to achieve the goal]. Accomplishing this goal will [result or benefit].

Here is an additional example: By January 1, 2025, implement a new USAC website using input from all sub-teams so Penn State staff can more easily access USAC communications.

SMART goals can also support an individual’s personal and professional development and can be incorporated into the annual performance review cycle.

This example is a win for personal and professional growth and could benefit the Staff Advisory Council too: To grow in my career, I need to improve my PowerPoint skills. So, in the next three months I will complete an online PowerPoint course. By improving my PowerPoint skills, I will become more proficient, and I will create a presentation for my local Staff Advisory Council.

REMEMBER: It is important to collaborate with your supervisor to determine which goals appropriately align with one’s personal and professional development.

Determine metrics and value reporting process

You should determine what data you will need to track your progress and how you will be able to collect it. This might include the use of ongoing surveys, periodic presentations, or an annual report.

Some data points that might be measurable are:

1. Employee Engagement and Satisfaction:
   a. Conduct regular surveys to assess how satisfied employees are with the council’s initiatives and communication.
   b. Track changes in employee morale and job satisfaction over time.

Source: https://th.bing.com/th/id/OIP.EiwomMwnnUcWRxJWnUmzgAAAA?rs=1&pid=ImgDetMain
2. Participation Rates:
   a. Monitor the level of participation in council activities, meetings, and events.
   b. Compare attendance rates before and after the council’s establishment.

3. Feedback and Suggestions:
   a. Quantify the number of feedback submissions or suggestions received from employees.
   b. Evaluate the quality and relevance of these inputs.

4. Impact on Policies and Practices:
   a. Measure the influence of the council on organizational policies, procedures, and decision-making.
   b. Assess how many recommendations were implemented.

5. Diversity and Inclusion Metrics:
   a. Evaluate whether the council promotes diversity and inclusion.
   b. Track representation of different demographics within the council.

6. Communication Effectiveness:
   a. Assess how well the council communicates with employees.
   b. Measure the reach and impact of communication channels (e.g. newsletters, town halls).

7. Conflict Resolution:
   a. Quantify the number of conflicts resolved or prevented by the council.
   b. Evaluate the effectiveness of conflict resolution mechanisms.

Remember that these data points should align with the council’s goals and organizational context.

Regularly review and adjust your evaluation approach to ensure it captures meaningful insights.

Communicating the value of your SAC can often be one of the most difficult challenges of this entire process. Try to think about where this data will come from, the people that have been positively impacted by your efforts, and how to create opportunities for feedback. Websites and social media outlets cannot only be used to promote events, reports, and projects that the team is working on, but can also allow for visitor comments...an invaluable source of qualitative data. Combining this with concrete numbers for events, projects, and other activities will help to bring your impact into focus.

Be sure to keep good records of your accomplishments throughout each year and be prepared to retrieve and review them when necessary.

Remember, it is important to work with your sponsor(s) to see how they would like the data presented. Demonstrating value not only will help to grant them a clearer picture of your activities but will also fuel the team’s drive to make an impact on behalf of staff.
Appendix

Phases & Resources for Staff Advisory Council Development

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<th>Phase</th>
<th>Step</th>
<th>Recommended Tools</th>
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| Determining the Need          | Understand your campus needs and how a staff advisory council could address those needs | **Needs assessment using tools such as:**
|                              |                                                                      | - Questionnaires                                                                 |
|                              |                                                                      | - Surveys and polls: [Qualtrics](https://www.qualtrics.com), [REDCap](https://www.redcap.ac.uk/) and [Microsoft 365 Forms](https://microsoftforms.microsoft.com) |
|                              |                                                                      | - Informal discussions                                                            |
|                              |                                                                      | - Focus Groups                                                                    |
|                              |                                                                      | - Town halls                                                                      |
|                              |                                                                      | - Previous USAC Listening Sessions                                                |
|                              | Gauge support from colleagues and document the information           |                                                                                  |
| Educational Efforts           | Increase understanding about the advantages, impact, and opportunities that a staff advisory council can bring | **Messaging such as:**
|                              |                                                                      | - Testimonials from staff members, chancellors, and HR representatives             |
|                              |                                                                      | - Flyers or other promotional materials                                           |
|                              |                                                                      | - Reference peer councils within your organization                                |
| Requesting Support and Sponsorship | Gain official support for the council from your senior leadership (chancellors, deans, executives, faculty senate, prominent alumni or alumni groups) and present potential sponsors with needs assessment data | **- Letter of support from HR**
|                              |                                                                      | **- Use your needs assessment data above**                                         |
| Choosing Potential Members    | Reach out and select potential members, ensuring diversity across membership | **- Work with supervisors/HR to determine an application process**                  |
|                              |                                                                      | **- Utilize [USAC Application Template](https://usac.vuw.ac.nz)**                   |
|                              |                                                                      | **- Reach out through word of mouth**                                             |
|                              |                                                                      | **- Use campus wide communication channels**                                       |
| Holding First Meeting | Hold first meeting with a clear agenda, allowing members to get to know one another | **Agenda with the following items:**
- Reference USAC Agenda Template
- Define your mission
- Establish your initial objectives
- Discuss membership and representation
- Determine council and committee roles and responsibilities
- Discuss possible connections
- Develop your SAC By-Laws: utilize the USAC By-Laws template |
| Setting Goals and Evaluating Impact | Develop well-defined goals | **SMART Goals:** Specific, Measurable, Achievable, Results-focused, and Time-bound |
| | Determine metrics and value reporting process, working with your sponsors to understand how they would like to see data presented | • Surveys
• Annual reports
• Presentations
• Utilize AI (Artificial Intelligence) to assist in sorting through data
  • Copilot is an excellent tool |
| Collect & Archive Documents | Capture all meeting agendas, minutes, and reference documents. Keep track of all data points as referenced above. Archive all documents in an accessible folder. Ensure transferability from one council group to the next. | • Utilize USAC Community Group Teams folder as a central repository for all documents.
• Share information with USAC colleagues. |
| Complete the Staff Advisory Council Leadership Transition Form | Complete the form at the end of every fiscal year to ensure that all relevant information is shared with the incoming leadership of your staff advisory council and USAC. | • [https://forms.office.com/r/Msz89ZviRY](https://forms.office.com/r/Msz89ZviRY) |