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Tools and Resources for Project-Based Community Advisory Boards
Community Voice and Power Sharing Guidebook

Diane Arnos, Edward Kroll, Emma Jaromin, Hannah Daly, and Elsa Falkenburger

October 2021

About This Toolkit

This toolkit offers practical guidance, questions, and approaches for incorporating a community advisory board (CAB) into a project or initiative to strengthen community empowerment, buy-in, and participation.

In this toolkit, you will learn

- Seven key considerations when forming a CAB

- External tips and tools related to CABs

- Examples of Urban projects that incorporate CABs

- CAB budgeting and compensation guidance

- Institutional review board considerations

- Questions to ask to determine whether your project is ready for a CAB

Seven Key Considerations When Forming a Community Advisory Board

Community advisory boards (CABs) are composed of community members who share an identity, geography, history, language, culture, or other characteristic or experience and convene to contribute community voice to an initiative, program, policy, or project. (For the purposes of this document, we refer to CABs that are part of a larger project team that includes members who are both internal and external to the defined community.) CABs were originally developed in the medical research field to ensure a deeper level of informed consent. While CABs were born out of research practices, they are also commonly used in policymaking, direct service provision, and the private sector. It is challenging for a CAB to represent all facets of a chosen community, but the group should aim to be as diverse and representative as possible. CAB members are expected to voice community perspectives and priorities to protect communities from harm and optimize community benefits from the work at hand. Among CABs, the degree of power may vary from playing an informing or advisory role to serving as coleaders and directors with decisionmaking abilities.

A CAB can be both autonomous and an integral part of any project team, providing an essential link between team members who are external stakeholders and members of the community. The CAB ensures local priorities and concerns are reflected—and, ideally, prioritized—in the project's goals, processes, and activities. This community engagement tool can be an essential component of the trust-building process in a new partnership and can help ensure community engagement is maintained for the duration of a project or initiative. Fundamentally, the CAB is the primary vehicle through which the community shares local knowledge and lived experience, ensuring the work is guided by a robust understanding of the community and by relevant data that can lead to more effective research, programming, and policymaking.

The project team should explore seven key considerations when forming a CAB. This exploration is crucial to understanding when a CAB is the appropriate community engagement tool for the team's work. These considerations are applicable to any stage of the project (e.g., concept design, proposal development, implementation).

01 Objectives

- How can a CAB help improve the project's quality and impact? What contextual, historical, structural, and/or cultural factors might a CAB be able to lift up that are currently missing?

- What experiences, skills, or voices are missing from the project that a CAB could fulfill?

- Is there a logical connection between the project goals and the intended activities of a CAB?

- Have you explored other community engagement structures or mechanisms (e.g., steering committees, focus groups, community survey)? What does a CAB provide that these options do not?

- Will the CAB serve only the purposes of the project, or will it also support other initiatives or community priorities? Could the CAB help identify ways it could be a sustainable resource in other areas?

02 CAB Readiness

- Does the project have a community engagement strategy that identifies the role of the CAB in the research or project design?

- Are personnel and financial resources (e.g., staff time, incentives and compensation, travel) assigned to support the formation and implementation of the CAB?

- Are there local partners or community-based organizations that the project team will partner with in the formation, recruitment, and hosting of the CAB?

- Are there clear steps or actions to take to build trust between the project team and CAB members?

03 Research and Program Design

- What level of transparency will the project team have with the CAB (e.g., proposal, budget, institutional review board, draft materials)?

- Will the project team incorporate feedback from CAB members into the research design (e.g., methods, approach, feasibility, practicality)?

- Is the project team soliciting guidance from CAB members on the risks or the viability of the proposed research?

- Will CAB members support the interpretation and analysis of research findings?

- Will CAB members support the dissemination and implementation of research findings?

- If the project is further along in its life-span, how can a CAB serve a purpose that is not superficial?

04 Membership Composition

- Does the project have a preferred resourcing composition for CAB membership (e.g., cultural insight, technical expertise, access, leadership)?

- Does the project require a specific type of demographic representation (e.g., age, geography, race or ethnicity, gender)?

- Do members need to have past experience with research or the topic at hand?

- Has the project team considered additional implications for certain groups (e.g., young people)?

05 Membership Recruitment

- Is there a clear set of selection criteria that reflect project goals and the intended function of the CAB?

- Who is involved in the CAB member selection process (e.g., principal investigator, research team, community partners, funder)?

- How will the project team ensure the CAB membership invitation is widely disseminated?

- Can membership be open, or can you build in opportunities for members to cycle in and out?

- How will the project team ensure the CAB represents the broader community (not just the conventional leaders and most vocal community members)?

- Have conflicts of interest—perceived or actual—been considered, addressed, or mitigated?

- Has the project team consulted with community members in selecting an accessible and comfortable process for interviewing CAB members?

06 CAB Formation and Operations

- Have the roles and expectations for CAB members been developed with them and clearly communicated?

- Has the project team established bylaws, procedures, and decisionmaking processes with and for the CAB?

- Is there a training plan and timeline for CAB members and your staff?

- Has the team discussed and decided how the CAB's input will affect project processes and outcomes? Have you told CAB members how their decisions and advice will affect project outcomes?

- Have funds been allocated for CAB members' compensation and support?

- Is there a defined letter of agreement specifying responsibilities and compensation for CAB members?

07 Membership Engagement

- Is there a reliable and mutually agreed upon way to communicate with CAB members?

- Is there a set frequency, time, and location for CAB meetings?

- Are child care, transportation, internet connectivity, translation services, venue security, or any other logistical resources under consideration to accommodate CAB members' needs?

- Are there any accountability mechanisms (e.g., internal check-ins and deadlines) for CAB members to complete activities or work outside of meetings?

Tips, Tools, and Other Resources Related to CABs

This section provides additional sources of information (including links to external resources) and guidance on CABs.

General Guidance

CAB OVERVIEW RESOURCES

- [Community Advisory Boards in Community-Based Participatory Research: A Synthesis of Best Processes](#)

- [Best Practices for Convening a Consumer Advisory Board](#)

- [Tennessee Department of Children's Services Community Advisory Board Toolkit](#)

- [Tips for Developing a Community Advisory Board](#)

EXAMPLES OF URBAN PROJECTS THAT INCLUDED CABS (MORE INFORMATION IN NEXT SECTION)

- [Promoting Adolescent Sexual Health and Safety](#)

- Transforming Health and Health Care Systems

CAB Readiness

BUILDING A COMMUNITY ENGAGEMENT STRATEGY

It can be helpful to create a timeline of the project that includes all of the tasks and steps needed for community engagement. This can be done by creating a "community engagement strategy/timeline" part of the timeline, which maps out exactly when all community engagement activities will occur and how long they are anticipated to take.

- [International AIDS Vaccine Initiative Guidance Tool for Community Advisory Boards](#)

CHOOSING COMMUNITY PARTNERS

One step in the CAB process is choosing community partners who align with your project's mission, as well as doing the work of sustaining and maintaining those partnerships.

Many communities have an existing set of leaders who are active in local initiatives. It is important to include active leaders but also to reach other areas or subgroups of a community who may not feel they are well-represented by the existing leadership.

- [Community Tool Box Creating and Maintaining Coalitions and Partnerships](#)

ROLE OF CAB IN PROJECT AND STAFFING

It is important to be clear about the CAB's role within the larger project and who on the project team will be in charge of interacting with and coordinating the CAB.

- [Inspiring Change manual](#)

- [The Community Advisory Board from the Empowerment Project](#)

Research and Program Design

The team should have a sense of what role the CAB will play in research and program design and the level of transparency the team will have with the CAB overall. If it is a research project, this could include how much feedback from the CAB is incorporated into design, perceived risk, and interpretation and analysis of findings. For other projects, it could be how much insight from the CAB is incorporated in program design and disseminating project information to important stakeholders.

- [Resource for Integrating Community Voices into a Research Study: Community Advisory Board Toolkit](#)

- [Vanderbilt Institute for Clinical and Translational Research Community Engagement Studio Toolkit 2.0](#)

CAB Formation and Operations

The team should ensure roles and expectations for CAB members are clearly laid out and communicated and that bylaws and decisionmaking processes are established. The team and the CAB should work together to ensure internal processes and structures make the CAB run smoothly.

- [Tennessee Department of Children's Services Community Advisory Board Toolkit](#)

Membership Engagement

It is important that the team engages with the CAB in an intentional way and structures the CAB to fit the needs and requirements of its members. This includes ensuring CAB members are adequately compensated for their time and given resources they need to meet their commitments (e.g., child care or a transportation stipend), establishing a way to communicate with CAB members, and determining the frequency of meetings.

Urban Project-Based CAB Profiles

Promoting Adolescent Sexual Health and Safety (PASS)

Funder: W.K. Kellogg Foundation, National Institutes of Health, DC Department of Health, US Department of Health and Human Services

Project summary: PASS is a community-based participatory research collaboration to develop a response to teen sexual health and safety needs outside a school or health setting.

Role of CAB: Provided input on needs and preferences in programming approach and service provider partners, analyzed data, and provided input and feedback to the steering committee (decisionmaking body composed of external stakeholders and community members). The youth CAB piloted the program, provided feedback, and presented data in a Data Walk.

Budget/compensation structure: Members of the steering committee received $1,500 quarterly for their participation (weekly meetings, decisionmaking). Adult CAB members received $50 per meeting (monthly). Youth CAB members received $25 per meeting.

East Baltimore Research Project

Funder: Annie E. Casey Foundation

Project summary: The East Baltimore Research Project is a community-led effort to equip residents with data about their neighborhood. Urban provides training and assistance to build residents' abilities to collect and interpret data that can be used to inform community change.

Role of CAB: The CAB created the foundation and goals for the project. The CAB has played a lead role in selecting and onboarding outside organizations to implement the project objectives. The CAB oversees most decisions to ensure

activities remain on task and respectful to the community and keeps the community informed through regular newsletter updates.

Budget/compensation structure: The Annie E. Casey Foundation provided the CAB with its own funding ($150,000 per year for six CAB members).

Robert Wood Johnson Foundation Transforming Health and Health Care Systems

Funder: Robert Wood Johnson Foundation

Project summary: The goals of the Transforming Health and Health Care Systems team are improving access and affordability of health care and coverage; promoting health equity; and supporting the provision of integrated, high-quality, and whole-person health care. The research focuses on efforts that seek to address both medical and nonmedical health needs through collaboration with other sectors. A key objective is ensuring efforts are responsive to consumer and community preferences.

Role of CAB: The CAB, established by the Urban Institute, will be composed of people who represent diverse and underserved communities, including current and former Medicaid beneficiaries and those who advocate and care for them. CAB members will share insights and provide input into framing research questions and interpreting findings and will support dissemination of the findings.

Budget/compensation structure: CAB members will receive stipends of up to $1,000 based on the time required. CAB members are not research subjects. They are community members who are paid as consultants to give input and guidance on the design of the research projects.

CAB Budgeting Tool

The success of a CAB depends in part on having sufficient personnel and financial resources to support the board's formation and implementation throughout the project. This tool can help the project team sufficiently budget for a CAB and addresses member compensation or incentives, staff time, travel or meal reimbursements, and other projected costs.

Considerations and Approach

- Does the funding source offer flexibility in timeline, allocation of resources, substantive focus, and approach to the work so that you can align your efforts to CAB priorities and preferences? Have you noted and shared information about where there is flexibility and where there are hard requirements or deadlines?

- What are the project leader's interest in abilities to dedicate adequate human resources to managing the CAB, and what is their commitment level?

- Have staff been allocated hours to support the formation and maintenance of the CAB?

- Have funds been allocated to community partners or community-based organizations in the form of an honorarium or consultant agreement to compensate them for their time and support?

- Have funds been made available to compensate CAB members in the form of stipends, incentives, food, etc.?

- Have expenses such as meetings space, supplies, and trainings been considered?

- Are child care, transportation, internet connectivity, or other barriers to participation being considered to accommodate CAB members' needs in exchange for participation?

- Does the CAB have a set time frame, or will it be sustained after the project ends?

Developing Your Budget

These tips will help you account for CAB-related costs at the beginning of the project or at the proposal development stage.

1. Create a separate column for CAB formation and maintenance in proposal development (if applicable) or the project budget template.

2. Allocate staff hours needed to support the formation and maintenance of the CAB.

    a. Tip: Consider the full cost and time required across each stage of a CAB.

3. Include compensation (e.g., honoraria, consultant agreements, subgrants/subcontracts) for community partners or community-based organizations.

    a. Tip: Be sure to consider the cost of meeting space, partners' staff time, recruitment, etc.

4. Include compensation for CAB members, either in the form of incentives or a more formalized agreement (e.g., hiring each of the CAB members as a consultant, depending on the structure and practices of your organization), for the length of the project.

    a. Tip: If a community-based organization is identified as a partner, think through if it would be easier to compensate them through your organization directly or through their organization.

5. Estimate travel-related expenses for CAB members and the project team.

6. Estimate what supplies, such as food or printed materials, will be required and what other miscellaneous costs or expenses will be needed.

Member Compensation

Compensation for CAB members should be offered to offset legitimate costs of participation in the advisory process (e.g., meals, payments for time, and reimbursements for transportation costs) as well as their level of community expertise. Traditional methods for determining hourly rates may not translate to the CAB.

Time: Funds should be allocated to compensate members for each meeting, their related preparation or review of materials, training, and other CAB activities. The project team, in partnership with community partners, should identify a rate that reflects the level of community expertise offered by each CAB member. The project team might have to go through internal processes that might not align as clearly with the process for traditional hires. A human resources department might require that a consultant or someone who comes onto the project in a formalized way have a rate that is "justified" by their prior experience and education. If this is the case, it can be difficult to justify an hourly rate for individuals who have not worked as consultants in the past and whose expertise is often undervalued in the labor market, which does not mean that they should be paid at a rate lower than they deserve. Create an equivalent measure of technical and substantive experience that recognizes the depth of community knowledge that CAB members will offer (e.g., number of years as part of the community, leadership position in the community, previous involvement in a certain topic or issue). An alternative compensation approach for CAB members could be through monthly or quarterly payments or honoraria, depending on the practices of the organization. This approach ensures a community member can block off a certain percentage of their time, knowing they are guaranteed income, and the expectation for their work can be flexible from month to month or between various tasks. A third approach, for shorter-term engagements, can be to use incentive payments or honoraria, which may be more flexible and less labor intensive.

Meals: The project team should consider providing food at each CAB meeting and account for the cost in the project budget, reflecting the number of members and in-person meetings during the project. It is critical to ensure that your funding source or project structure allows for the purchase of food.

Travel: The project team should account for the cost of travel for CAB members. The cost depends on the number of members, the number of in-person meetings, members' general proximity to the meeting location, and the mode of transportation. The cost can also be reflected in stipends or incentives. It is critical to ensure your funding source or project structure allows for transportation costs.

Other expenses: The project team should account for additional costs, such as paper supplies or materials, meeting space, child care, trainings, or facilitators.

CAB Institutional Review Board Considerations Tool

An institutional review board (IRB) is a group formally designated to review and monitor research activities to protect human subjects. In addition to providing community perspectives and input to the project team, CABs can help ensure community members participating in a research study are protected, if applicable to the specific project. A CAB can help project staff anticipate and address the context to which communities understand risks, benefits, and informed consent.

Depending on the CAB's role in the research study or design, there are several things to consider in determining the project's IRB implications. Below are some ideas for how a CAB can engage in the IRB process and content and some guiding questions to consider. The CAB can provide input on the following components of an IRB package:

- CAB purpose, goals, and role
- Interaction with human subjects
- Human subjects and community risk and benefits
- Protections and safeguards
- Informed consent or consent procedures

When a team is deciding whether to incorporate a CAB into its project, the following IRB-related questions should be considered:

- What role will the CAB members have in the research study?
- Will the study involve young people, older adults, or other people who will need additional protections?
- Will CAB members be asked to analyze any data that might be confidential or sensitive?
- Do CAB members need to sign a confidentiality pledge?
- How will the project team account for privacy, both for CAB members and study participants?
- How will the project team determine the risks and benefits for CAB members? How will risks be mitigated?
- Has the project team assessed whether any proposed incentives may be coercive?
- If the work with the CAB will be long term (longer than a year), has the project team created a quarterly or biannual process for reporting plans to the IRB?

How CABs Can Contribute to Community Protections

Develop an understanding of the community's unique attributes and values, share that understanding with your partner(s) and other community members, and see what they believe the community's attributes and values to be. The following are questions to keep in mind when doing this work.

- Bring up alternative considerations related to benefits and risks that the team might not consider, and help mitigate those risks.
- Inform research priorities based on local needs.
- Advise researchers on community norms and expectations.
- Contribute to an effective informed consent process by providing input.
- Review forms and questionnaires.
- Engage in protocol development and review.
- Help build trust with the local community.
- Provide oversight of the research processes.
- Convey information about the research to the community and field questions.
- Assist in responding to any breaches to the IRB.

Full Project Team Readiness Checklist

The project team should review the CAB Readiness Checklist before launching or proposing a CAB for your work. Make selections to the best of your ability and based on where your team is in the process (concept design, proposal development, implementation, etc.). Feel free to leave additional comments or questions in the corresponding notes sections.

CAB Ideation and Planning

General	Y	N	Somewhat	N/A
Does the proposed project have a community engagement requirement?				
Is a CAB being considered to specifically meet this requirement?				
Have other engagement structures/mechanisms been explored (e.g., steering committees, focus groups, a community survey)?				
Has the project team hosted an internal meeting to discuss the reason for forming a CAB (e.g., leadership/input, practicality of research design, guidance on participant burden, predefined goals)?				
Does the project have a community engagement strategy that identifies the role of the CAB in the research design?				
Has the project team identified local community partners or community-based organizations to partner with?				
Are all team members and partners in agreement with predefined goals guiding the scope of work and formation of a CAB?				
Will CAB members serve independently or as representatives of an organization?				
Will CAB members serve in an advisory role?				
Will CAB members have decisionmaking power?				
Notes				

Research Design Considerations	Y	N	Somewhat	N/A
Is there a logical connection between the research design, activities, and intended goals of the CAB?				
Will the project team incorporate feedback from CAB members into the research design (e.g., methods, approach, feasibility, practicality)?				
Is the project team soliciting guidance from CAB members on the risks of the proposed research?				
Will CAB members work on the interpretation and analysis of the research findings?				
Is the project team willing to commit to a predetermined level of transparency with the CAB (related to, for example, the proposal, budget, IRB, or draft materials)?				
Leadership and Infrastructure Support				
Has leadership committed to supporting and maintaining the CAB over the length of the project?				
Does the funder demonstrate interest in dedicating adequate human resources to managing the CAB?				
Has the project team considered the time that a CAB may require of the entire project team (e.g., principal investigator, researchers, support staff)?				
Are personnel and financial resources assigned in the project budget to support the formation and implementation of the CAB?				
Have Urban staff been allocated hours to support the formation and maintenance of the CAB?				
Are funds allocated to community partners or community-based organizations in the form of an honorarium or consultant agreement to compensate for their time and support?				
Are funds available to compensate CAB members for participation in the form of incentives, food, and more?				
Have other expenses such as meeting space, supplies, and trainings been considered?				
Are travel funds available for the project team to engage with the CAB in person?				
Will the project team need to ensure the sustainability of the CAB after the project ends?				
If not, does the CAB have a clearly defined time frame?				

Notes

Capacity	Y	N	Somewhat	N/A
Is there a designated staff member responsible for the formation, training, maintenance, and sustainability of the CAB?				
If so, will there be a single point of contact for the CAB to ensure consistency in communications?				
Is there a designated staff member to support meeting facilitation, meeting logistics, follow-up, payments, and more? Is there a clear plan for such logistical considerations?				

CAB Formation

Membership Composition	Y	N	Somewhat	N/A
Are there community partners or community-based organizations that the project team will collaborate with to facilitate recruitment, formation, or hosting of the CAB?				
Does the project have a preferred membership composition for the CAB (e.g., representation, cultural insight, technical expertise, access, leadership)?				
Is there a defined list of skills you are seeking in CAB members?				
Must members have experience with research or just expertise/experience on the topic or community/population being served?				
Are you seeking a specific demographic representation (e.g., geography, race/ethnicity, gender)?				
Are young people or older adults being considered to serve as a part of the CAB?				
Membership Recruitment				
Is there a clear set of selection criteria that reflect research goals and the function/purpose of the CAB?				
Is there an outlined approach for the CAB member selection process (e.g., what role will the project leader, research team, community partners, and/or funder play?)?				

Can local partners and community-based organizations nominate or endorse people to serve on the CAB?				
Is the project team conducting interviews of nominees?				
Have possible conflicts of interest been considered, addressed, or mitigated?				
Has a threshold been set for the total number of community members being recruited to serve on the CAB?				
Are there clearly defined roles and expectations for CAB members?				
Have the benefits of the CAB been clearly communicated to the community?				
Is there a defined list of commitments for CAB members?				
Has a length of term for CAB members been set?				
How will the team recruit members for the CAB?				
Notes				

CAB Operations and Maintenance

Governance and Leadership	Y	N	Somewhat	N/A
Have the members and project team established bylaws, procedures, and decisionmaking processes for the CAB?				
Is there a defined letter of agreement stipulating responsibilities and compensation for CAB members?				
Will the CAB have equal decisionmaking power with the project team?				
If so, are there clear guidelines on how the CAB's decisionmaking power will affect the scope or design of the research?				
Is it clear to CAB members how their decisions and advice affect the research?				
Operating Procedures				
Is there a set frequency for how often CAB members will meet?				

Is there an established location for CAB meetings?				
Are child care, transportation, internet connectivity, and other logistical resources under consideration to accommodate CAB members' needs?				
Is there a reliable and mutually agreed upon way to communicate with CAB members?				
Is there a clear action plan provided for the CAB?				
If not, will you give the CAB the responsibility of developing a list of tasks/activities that reflect their mission statement and goals?				
Membership Engagement				
Is there a training plan and timeline for CAB members?				
Is it necessary to assess CAB members' knowledge of or familiarity with the research topic?				
Will the CAB decide what trainings are wanted/needed?				
Depending on the length of the project, will additional trainings be necessary?				
Are there clear events or actions to take to build trust between the research team and CAB members?				
If you will be working with communities that have had negative experiences with research and/or researchers, do you have a plan for recovering or establishing trust?				
Are there activities that CAB members will need to complete outside of meetings?				
If so, will you develop a reward system or system of accountability?				
Notes				

Acknowledgments

About the Urban Institute

The nonprofit Urban Institute is a leading research organization dedicated to developing evidence-based insights that improve people's lives and strengthen communities. For 50 years, Urban has been the trusted source for rigorous analysis of complex social and economic issues; strategic advice to policymakers, philanthropists, and practitioners; and new, promising ideas that expand opportunities for all. Our work inspires effective decisions that advance fairness and enhance the well-being of people and places.

URBAN INSTITUTE

500 L'Enfant Plaza SW
Washington, DC 20024

www.urban.org