**ROUGHLY EDITED TRANSCRIPT**

**APRIL**

**Succeeding at Succession Planning**

**with Paula McElwee and Robert Hand**

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>> MARY OLSON: I'm going to give it a go here. It seems like every time I start my introduction we have more people ding in.

Good afternoon. Thanks again, everyone, for joining us on today's call. It's succeeding at succession planning. If you need to access the CART for today's call, please go to the APRIL Web site at www.april‑rural.org and follow the link on the homepage.

The materials for today's call, including a PowerPoint, and the Word document with a sample success plan thanks to Robert, or Bob, I don't know which you prefer, that's also available on the website and both of those also went out on the email you may have received from the APRIL listserv.

If you are having trouble accessing any of those, you can email me at Mary.Olson@mso.umt.edu. Today's call will be recorded thanks to Bill Cochran and that audio recording and transcript will be available online at our Web site under the IL conversations tab following the call.

During today's conversation if you would like to add to the topic from your experience or you have any questions to ask, please press star 2 on your phone to raise your hand so I can make your line live. And I'm sure our speakers are going to give us opportunities throughout to ask questions, but if at any time you want to press star 2, I will kind of know you're in the queue and that you're ready to ask a question.

If you are using CART, you can just type in your question in the box, and I will do my best to follow those and get those asked and answered.

Please remember to evaluate our conversation on our Web site following the call under the IL conversations tab or again from the email announcement from APRIL or ILRU.

That's really important and makes us stronger as an organization.

For this IL conversation is provided by the U.S. Department of Health and Human Services Administration On Community Living. No official endorsement of the department of Health and Human Services should be inferred.

Without further ado, I would like to introduce your presenters.

Paula McElwee in 1979 directed Link Inc. based in haze, Kansas, and it was one of the first centers under the Rehabilitation Act. She worked in the disabilities field in Kansas for 25 years and was appointed to three terms on the Statewide Independent Living Council of Kansas. In 2000 Paula relocated to Fresno, California, where she served on the board of resources for independence of the central Valley, a longstanding California center. Since 2006 she has also served as interim Executive Director for four Centers for Independent Living in California, assisting the boards to transition to their next Executive Director. In October of 2012, Paula became the technical assistance coordinator with Independent Living resource utilization, ILRU, based in Houston, Texas.

We also have Robert Hand, and Robert is the Executive Director of resources for independence Central Valley in Fresno. Robert is the founder and facilitator of the Central Valley coalition for human services, immediate past chair of the City of Fresno Disability Advisory Commission and Chairman of the Board of the California Foundation for Independent Living Centers.

Robert has cowritten several training manuals on various aspects of nonprofit leadership, including "Leaders Without Limits", and provides consulting services for CILs. He was appointed by the Governor to the State Rehabilitation Council where he is the chair and the state Independent Living Council past member. He was also appointed to the California Olmstead Committee where he cochairs the Housing Subcommittee. Robert has worked in nonprofit corporations for over 40 years, including the CEO of nonprofits of over 30 years. He has a master's degree in rehabilitation counseling and has been an adjunct instructor at Fresno State in nonprofit management. We are so lucky to have both speakers with us today and I am so excited to hear what we're going to learn.

Again, one more time, for folks just joining, if you haven't yet, please pull the PowerPoint for today's call at our Web site at www.april‑rural.org. Without further ado, take it away, guys.

>> PAULA McELWEE: Thanks, Mary. We're going to start on slide 2. If you have pulled up that PowerPoint we are going to start by asking what is success planning, because I think we throw terms around and sometimes it's good to stop time a second and tell what we're talking about. Bob and I are doing this together because you may have picked up from our intro that he and I have worked together in a number of different ways over the last few years, and I did serve on his board for a period of time, and so I knew that he had a succession plan, and it's always good to have somebody who has that experience. So that's one of the reasons that we decided to do this together.

Succession planning is planning around who can do the job of key staff in the event that the current person can't do that anymore. Now, sometimes that's short term, and we'll talk about different reasons why it might happen. Sometimes it's long term. But the key person is no longer available, what are you going to do? And when we see centers flounder, it is often because they haven't thought this through and they don't have a plan and then they make some choices that are ill‑advised in the process of figuring out what to do.

We usually think about this with the Executive Director position, but it may be just as important to plan for unexpected absences of someone else who is really key to functions in your organization, like your fiscal person, you know, who is it that writes the checks, who is it that processes payroll, who is it that makes sure you get important reports to the board. Those people also you probably need to think in terms of, okay, if they're gone, who is going to do that work? Hopefully that kind of makes sense.

On slide 3 we talked a little about why centers avoid or postpone the planning for succession. Bob, did you find it kind of difficult to get the board to talk about succession? Did you find you had to do most of the talking?

>> ROBERT HAND: Well, because you were on the board, Paula, I think we did it pretty well, with you but I was just presenting at some of the Independent Living Centers in California, and one of the things I talked about was succession planning, and I asked them how many had a written plan for their Executive Director for succession planning, and probably four or five out of 20 raised their hands. Many of those are excellent organizations that are very well run, but, yeah, people just don't deal with it until it becomes necessary.

>> PAULA McELWEE: Sometimes it's ‑‑ it's called that hit by a bus scenario. What do we do if so and so gets hit by a bus? And that's hard to talk about, because then you're talking about somebody leaving, and that's uncomfortable because some of the reasons that they might leave are uncomfortable to talk about. If I have a heart attack and I have to leave, that's not in anybody's hands, but we don't really want to think about that. I have a theory we ought to call it the "won the lottery" scenario, so if the staff person won the lottery and is taking a trip around the world for three months before they decide if they're going to bother to come back to work, what would we do? That might be easier to talk about.

>> ROBERT HAND: I use that, too, Paula. I say, what is my organization going to do if they get a call in the morning that I'm in Tahiti because I just won the lottery?

>> PAULA McELWEE: Exactly.

>> ROBERT HAND: If they have a plan for that.

>> PAULA McELWEE: Yep. So if it's hard to talk about, maybe find another way to talk about it. Sometimes this is not a real public plan, depending on how much detail you put into your plan, or sometimes you have notes to it that are not real public, because to announce in advance seems like you're appointing a long‑term successor, which may not be the case. A succession plan can deal with just a few days. You know, if it's a critical time for your organization. It can deal with a year if it's a time you're going to take a national search and summed other things with your organization. So how long this plan takes varies, and you don't want to make it look like you've announced somebody as your long‑term successor as a part of the plan. In fact, we don't recommend that you put names in the plan at all. Titles, maybe. Process for the board to do, absolutely. But you may find that things change so fast, even the titles now may be changing, too, because you have a constantly moving target. Bob is experiencing some of this now. He hasn't said this yet, but he has announced his retirement for next year, and so he's already in his succession plan, right, Bob? Maybe I lost him.

Anyway, it's okay if the plan isn't too public.

>> ROBERT HAND: I'm there, sorry. Yeah. We started it about nine months early, actually. That's the design of ours, was to start the process, as long as that's possible, and it was in this case, about nine months before I'm scheduled to leave.

>> PAULA McELWEE: So that gives you some time to get the word out, get some good applicants maybe from a national level, somebody who wants to live where it's not cold in the winter. Of course, we won't talk about how hot it is in the summer.

>> ROBERT HAND: Don't say that.

>> PAULA McELWEE: Anyway, the plan probably, you need to think about, is it public or not, is it awkward to announce it publicly, do you want to do that in notes maybe to the board but not in the plan itself so that the plan can be a part of the public conversation.

Are there any other reasons that you might want to ‑‑ that you might be postponing or avoiding that planning process? Anything else that comes to mind? If you raise your hand, Mary will open your mic.

>> MARY OLSON: It looks like we have one hand raised so far. I'm going to unmute you. Hi, caller.

>> PAULA McELWEE: Introduce yourself and answer, please, or say what you want to say.

Okay. We're not hearing anything. So maybe we missed you. But we'll give you lots of other times to talk. Mary, remind us, we hit star 2?

>> MARY OLSON: Folks, if you hit star 2 on your phone, that raises your hand, and then I can make your mic live from there, and if you are in the CART room, you can just type in your question and I can voice your question for you.

>> PAULA McELWEE: So keep that in mind.

Let's look at the fourth slide. There are lots of reasons why people have to leave, and sometimes suddenly. Sometimes that has to do with the death or illness of a family member or immediate family member where they have to take on a lot of responsibility for a period of time, several months sometimes, in order to manage that. Sometimes they've been hoarding their vacation time and they take a long honeymoon, so they're gone for a period of time. And for me, when I was in that position, if anybody was gone for more than a payroll cycle, we needed to stop and think about it, and for sure for a month, because there are things that occur every month that different important people have responsibility for. So you sure want to keep that in mind. Of course, personal illness that requires rigorous treatment that the person is away for a period of time. Certainly an injury that requires pretty intensive rehab, they can't work until certain things are done. And maybe in October the publisher's clearinghouse will show up on their doorstep. I think it's up to $7,000 a week. Anyway, I've been hearing about the Publisher's Clearinghouse. There are other reasons. I don't know, Bob, if you can think of other reasons why people would step away from work that might require succession.

>> ROBERT HAND: The only other one I can think of offhand that I've seen happen is someone's affiliated with another organization as well and they sort of take a leave of absence to help them out.

>> PAULA McELWEE: So they leave one organization for a period of time so they can go do the other.

>> ROBERT HAND: Right. We've had cases where we've sort of loaned an employee out over an extended period of time.

>> PAULA McELWEE: That's a good solution. We will mention it again when we get farther on, how you might handle the transition. Your fellow centers, if you have good relationships and a good network of centers, there are times when a key person is gone where someone else may be able to help that isn't part of your center. Although we like to see you do that training internally, we also know sometimes you need to reach outside your center. Either the center loaning or receiving, you still have an interim plan of some sort going on there.

Let's look at slide 5. Maybe the language should be "succession development" instead of "succession planning." Because that gets to the heart of what needs to happen first. You have to develop the ability so each person is ready and able to support the organization and fill in for a period of time. So if you change the name in your mind from succession planning to succession development, it's less commonly used in management circles, but it does help you communicate kind of what you have in mind, that you want to develop the ability of your management team or others within your organizations so they can fill in for each other if they need to for a period of time. And you're not talking only about the Executive Director, then. If you broaden it and you're talking about more, I think that really serves you well as an organization. It gives you some depth. It helps you to have some ‑‑ what you think of in sports as a deep bench, you know, other people who can come in and help out and take on a role when they need to.

If you look at slide 6, this is for both short and long term, but it's the easiest to talk about and plan with your board and your staff if you talk about it as short term, knowing that you're also going to have a scenario that may also be long term. So it's easier to think about what to do while somebody is on vacation and not available and, yes, they should be unavailable when on vacation. That's a tough one in today's society because we all check our email, check our phone, unless you leave the country, where you don't have as easy of access to your phone and email, it really is hard to be unavailable, and it's important to give people permission to do that when they're gone.

But start there. Start with, okay, we have to have payroll. If so and so who does payroll isn't available, who is going to do it? Who is going to make sure? Who has the ‑‑ do you have the redundancy internally to make sure that somebody else can do that? Sign checks? Present financial statements to the board? What are some other things like that that have to happen? They have to happen no matter what, whether somebody is there or not.

>> ROBERT HAND: Paula, we actually have a system where every six months every staff person has to sign this form they make up. It says, here's all my key roles, and here's who else in the organization knows how to do them.

>> PAULA McELWEE: Excellent.

>> ROBERT HAND: It's not just for the Executive Director, even just for the finance manager, and we talk about those kinds of things. You know, if you have somebody specializing in housing, and they leave, or, as you say, they're going to be gone for two weeks, it's not fair to the disability community in your area to just say, oh, you need housing, you're going to have to wait for two weeks until the person gets back.

>> PAULA McELWEE: That's an important thing to look at. Sometimes you can partner with another center or a contractor to do some of the things, especially the fiscal part of it is fairly easy to do that with, but it's not easy to do that with other areas of specialty, especially if you have only one person who knows that area really well. Then you're setting up a situation where your consumers might not receive the level of services that you want to see.

>> ROBERT HAND: And when you talk about it may be difficult to talk about this planning, I think the important thing to say, like for me, is I haven't done my job is everything is going to fall apart when I walk out the door.

>> PAULA McELWEE: Boy, is that true.

>> ROBERT HAND: When you leave everything's ‑‑ you know, how are they going to find somebody else? It's all going to go bad. I say, if that happens, then I haven't done my job, because part of our job is not just doing things every day, but it's going to ‑‑ it's making sure that some system is in place so things will continue to be done correctly.

>> PAULA McELWEE: That's so important, isn't it, because if we believe in our mission, and if we're dedicated to the organization's mission in the community, we think it's important, then we shouldn't be just walking away and leaving it in a bad situation. We should be planning and preparing for any eventuality, which includes the ultimate reality that everybody will leave some day. Try to keep that in mind.

Jim Skinner, used to be the CEO at McDonald's, give me the names of two people who could succeed you. That's almost what you're doing except maybe in a duty‑by‑duty way with your staff every six months asking that question. Who could do this if you're not here to do it? That gives you a culture that has everybody working together for solutions related to ‑‑

>> ROBERT HAND: It recognizes succession planning for the Executive Director isn't anything special. You don't have to be looking at it and saying, oh, is somebody planning on his leaving? Is that why you're doing it? It's just part of the center's system to make sure and plan for anybody not being there.

>> PAULA McELWEE: Yeah, every eventuality, because if you are planning well you are going to know what to do to keep things going if one of the players isn't available to the center.

Sometimes the reason is not as ‑‑ it's not predictable, but that doesn't matter. What you're looking at is what are the positions themselves, who can back them up, and how are you going to make that happen.

Look at slide 8. That kind of summarizes some of that short‑term plan so you look at each position in your organizational chart. In the short term think about, let's say you think about a 30‑day plan, who can back the other person up? What training do they need? Do they need to practice it? Do they need to shadow the person when they're doing that task? What needs to happen so that they can do that back jack if needed? That's the kind of plan everybody can know about, including the board. It's important for people to have that kind of sense of continuity. So, oh, okay, if something happens, then we're okay. So and so is going to pick that up.

I'm going to show a little of my prejudice. Maybe it's a reality that's come from some really all of experiences that other centers have had, but I'm going to say that it doesn't work for a board member to be the short‑term sub for any position, and I don't know, Bob, what you think about that, but ‑‑

>> ROBERT HAND: Yes, you know, the thing about ‑‑ what's that statement? "All generalities are wrong, including this one"? There are individual situations where it works, but the vast majority of the time it doesn't. I mean, they're just two totally different roles, and to make any kind of assumption that because somebody is on the board they know how to run a center or how to do any of the particular jobs doesn't happen. And because their responsibilities are so different, you can run into that blurring of those lines that leave you with problems for years down the road.

>> PAULA McELWEE: I was recently talking to a center. One of the things I do is intensive support, and that means if you have a plan of correction with either your state or your federal government, I can assist you in working that plan of correction, developing the written document to submit, and then actually making sure that you follow through on all those pieces, and sometimes that's during a transition. It's a sometimes really tough situation that's going on. There's that kind of transition. So I see a lot of these, and I have not yet seen that one that's the exception. They have been just really difficult transitions. First of all, the board member is not necessarily trained to do it. You know, so they don't necessarily know what to do. But, as you said, you blur the lines for the period the board member is in there, and then if they ever return to your board, they come from a different perspective that is not always able ‑‑ that the person is not always able to back up and have the Longview again, which a board is required to do. So they get a little too involved.

Recently I was tonging to a board member who was leading a transition. They have I hired the new Executive Director. We were sitting around the table together. So the board member says, "Okay, she's starting Monday, so how long should I be here working beside her?" My recommendation was you don't at all. She can call you. You can go to coffee. But if you're here, the staff are going to be very confused about whose role is it to be the supervisor of the staff, and you are blurring those lines, and you're making it very confusing, because they know that you're going to return ‑‑ she had taken a leave of absence from the board. It's very confusing and it's not usually helpful.

>> ROBERT HAND: It's also, I think, can be difficult if the board member takes that position and remains in it, now their relationship to the board again can be unclear, even though they're no longer a board member, boards seeing them as board member and the Executive Director are making it unclear who exactly has what authority.

>> PAULA McELWEE: And I say this in another place in the slides, but we really recommend if a board member is to be considered for short term or for applying for a long‑term position at all that they must resign from the board before they apply, not if they get hired, but before they apply, because otherwise the power dynamic is just all messed up, and you may or may not actually end up with your best applicant if you don't look ‑‑ that's a little extra advice on the side.

But take a look at slide 9 and ask yourself will your vacation planning work in the short term if the hit by the bus or won the lottery thoughts come into play? Will it work for at least 30, preferably 90 days minimum for your short‑term plan? And if it won't, then keep working it because you need to get it in writing and think about how will it work for that first at least 30 days, hopefully 90 days and keep reexamining it from time to time to make sure it's current. Because job duties and players change and you want to make sure it's still workable. Practice that plan during vacations. Work out the bugs. Make sure people really can do those kinds much things.

If you look at the sample Executive Director succession plan that Bob provided, you will see his first scenario starts with a 90‑day notice and kind of goes through the plan of what the Executive Director's role is, and as he said, he also has this kind of thing that happens for his staff, too. So that gives you a sense ‑‑

>> ROBERT HAND: One of the places where we've really tested that, going on pregnancy leave.

>> PAULA McELWEE: Oh, yeah, yeah.

>> ROBERT HAND: Don't come here and drink the water, Paula. We've had several people out over the last year. So we've certainly been able to see how are we able to get their jobs done during that three or four‑month period.

>> MARY OLSON: Four months, wow!

>> PAULA McELWEE: Mary says ‑‑ she hasn't taken much time off. Mary, you had that baby a week and a half ago?

>> MARY OLSON: Yep!

>> PAULA McELWEE: She's on this call today. I don't know what that says, but hone flea you get to take some time to relax sometime.

>> MARY OLSON: Yeah, I will.

>> PAULA McELWEE: But if we hear the baby in the background, that's what's‑up up, right?

>> MARY OLSON: Yep. Thank you. I was just going to say, actually it's a great time, anybody again have questions or comments, just push star 2, and that raises your hand. You guys are explaining it so well, we don't have any questions yet.

Again, if you're on the CART you can just type in your question and I can voice that for you.

>> PAULA McELWEE: We'll give you a couple minutes to raise your hand or to type in your question.

>> MARY OLSON: Nothing yet, but I will let you know that I'll continue monitoring it, so if folks have questions, feel free to just type them in or push your hand up at any point in time and I'll let the speakers know.

>> PAULA McELWEE: Think about this, too, we'd like to know if you've had any actual experience with this what that experience has been with a transition that either should have been done differently or could have gone better or something you felt worked really, really well. So feel free to jump in with your examples, too, because we have the time for them, and I think that that helps inform each of us, gets more information out, more examples than just ours. So feel free to do that.

If you're looking at Bob's transition plan, the first scenario that he gave was a scenario where the Executive Director helps by being part of the plan. The Executive Director gives notice. And that certainly is your preference, of course, is that you have a situation where everybody's involved in a plan and they know about the plan and in advance they can take the time to actually work the plan. You'll see that he also listed there where the board should advertise. Now, my experience is this is very helpful information for the board to know as they develop this, either the search committee or executive committee or whoever you have in your plan reviews the job description to see if it's what you want, adds details to the announcements that are pertinent, and gets the announcement out there, and your board often does not know the network well enough, the Independent Living network well enough. They don't realize that you can post this on the NCIL and APRIL Web site if you're a member there. So if you're part of those two organizations, you can post your Executive Director's job description there. We also do that on ILRU's Web site. You can post key leadership positions on our site as well. You will notice in the list Bob gave on the first page of that succession plan it lists a lot of local resources. So the California department of re had been, of course, it would be the one from your state, the state association of centers, and then the central Valley coalition for human services is a local coalition of other nonprofits and service organizations, and there might be some leaders there who would be interested. And you can see by just looking down the list that there are lots of options, and a lot of times that's ‑‑ if they even know to call me, that's the first question the board members ask me, is where can we get the word out? How can we get it out? Now, I can't guarantee there's lots and lots of activity from me on these. We are in a situation in the Independent Living movement right now where young potential leaders are not coming up fast enough, and some of us are aging out and retiring. So we don't have as many you experienced IL people out there as I would like to see, and I hope we'll continue to develop that, but we'll see how the word can get out to the whole network and not just in your local ‑‑ whatever your local process has been in the past. So take a look at that.

And then if you notice, the second scenario, if you scroll down to that second scenario, the second scenario is no notice. Sometimes that's because the Executive Director is removed by the board. Sometimes it's just that the Executive Director ‑‑ one of those things we listed earlier happen and cannot give notice and is gone. So you'll notice that in that situation as well, if you decide how you're going to do it, and what's going to happen next.

>> ROBERT HAND: I can talk a little bit about that. Let me go back to the first one. Whoever the search committee is going to be, now, in our plan we have ‑‑ you include the Executive Director. Now that might be only in the first process of it, not necessarily, you know, at all in the decision‑making part, but I've seen too often where an Executive Director is in perfectly good standing, they decide to leave, and they're not included in that process, and the thing is, nobody on the board is likely to know any of the applicant, but the Executive Director is. So, you know, you may well get an applicant who looks good on paper and your Executive Director may have been to meetings with him at the state level or at the national level and say, "You know, this guy is really a flake. Here's the kind of things you should check in for them before you make a decision." So I think it's ‑‑ if the Executive Director is there, if they're in good standing, it's really important to include them in that process. But, again, not necessarily in the second part of the process where actual decisions are being made.

>> PAULA McELWEE: You know, most places get at some point, depending on how broadly they advertise, a pretty nice stack of applicants. I was just working with a very small Part B center in a rural area and I didn't think they would get very many, and they got four really decent applicants for their position, and I'm thinking, huh, well, what did they do right, you know? Sometimes when you don't expect it, there's still a pretty good set of applicants to look through and things to do.

Now, you want to help the board to do that as effectively as possible, and that is point at which the Executive Director has to step back. The Executive Director doesn't get to choose their own successor, even if there's somebody internally that they feel would be very good and they've kind of been grooming them. Even the board maybe even knows that person has been groomed for the long‑term situation. That's still not your decision. And it's the board's decision. Sometimes the ‑‑ sometimes the parting Executive Director would like very much to make that decision because they have personal loyalty and they can certainly provide the recommendation, but the board ‑‑ that's when you step back. The board has to make the actual decision.

>> ROBERT HAND: Yeah, and everybody, including the Executive Director, needs to understand that that from point on the board is the one responsible. So if as Executive Director I'm trying to overly influence that decision, it really isn't my place to do that. Because whoever I recommend, no matter how good I think they are, if they really mess up, I'm not responsible for that. It's the board who is.

>> PAULA McELWEE: If you look at slide 11, here some scenarios I've seen happen that have really been painful and damaging to the center. One of them is bringing in a board member as the interim or the short‑term, or sometimes even the long‑term person. I'm not saying there is no board member who could do this job, but I have seen many scenarios where the board is thinking, oh, we can help out our friend here as well as have somebody come in, because so and so is between jobs, so, you know, he can help us and we can help him, and everybody will be happy, and that this typically is not healthy for the organization to do.

The other reality is sometimes you have several strong middle managers and they are all working to position themselves to be the next Executive Director, and that sometimes is also very destructive to the organization.

So in both those cases, if it becomes a matter of struggling for power between people who are internal to your organization has the potential to cause your organization some real difficulties.

One center I know of purposely chose an internal person to be the interim who said, "I do not want the Executive Director's position. I will not take it even if you offer it to me. I'm too close. I'm not going there." And they chose that person to be the internal person, and it worked much better than it would have worked had one of the other power players been in that position because they are ‑‑ in that case there were about four middle managers who all had the potential to apply for and at least be considered for that position, and the last thing you needed is for one of them to be appointed your interim and then maybe not get chosen, or maybe as the interim tried to continue to position themselves in a way that puts the others down, it can just cause a lot of stress internally. So if you choose an internal person, really look for someone who does not want to be the Executive Director. And if you look at an external person, you know, think about how you might find somebody who has the capability to lead your organization through this transition, because it can be kind of fraught with emotion and turmoil.

I know one situation where the Executive Director passed away very suddenly, and there were a couple of internal potential applicants, and then a couple board members who kind of wanted to be the applicants, and in those situations had been this kind of scrambling internally that was not helpful to anybody. So when it becomes a power dynamic instead of in the best interest of your center, it can be ‑‑ keep that in mind.

>> ROBERT HAND: As the Executive Director, Paula, I think it's very important that your managers know you're not going to be part of the decision‑making process. Again, you'll be part of the process of making sure the word gets out and letting the board know if there's somebody who they absolutely shouldn't ‑‑ or should at least look into in more detail. You want to make it very, very clear that the decision itself you're not going to be a part of.

And I also have ‑‑

>> PAULA McELWEE: Absolutely ‑‑

>> ROBERT HAND: ‑‑ have seen where if they have the option anyway boards that purposely chose not just an internal personal, but a person from the outside who they knew was not going to be a candidate, as you said, for that same reason. So even as the person's working doing the position as an interim, they're not doing things that are going to help put them in a position to gain by it.

>> PAULA McELWEE: Exactly.

>> ROBERT HAND: Like they might be if they were also in the process of applying for the long term.

>> PAULA McELWEE: And you know, another thing that you want in your interim is not someone who is going to tear things down. So I think any of us, if we leave a position, we brought to that position our own flavor, our own skill set, and it could be that the interim comes in and has a different set of skills and is really strong in a new area, and they go in and they look at whatever. They look at the bylaws, the policies, whatever, and they don't like what they see. So it is not helpful to your organization if your interim is somebody who is going to come in and trash the prior person in that job. It has no value whatsoever. It's fine if they want to come in and suggest some changes to strengthen ‑‑ I'll get that word out ‑‑ changes to strengthen the organization, but it is not helpful ‑‑ I don't think any of us have ever done a perfect job in our jobs, and it's probably possible someone could come in and disagree with some element of what you did, but you want to know that you're choosing an internal or an external person who doesn't have that agenda of proving that they're smarter or better or whatever it is that they want to prove related to the situation.

>> ROBERT HAND: It's that medical statement "First do no harm."

>> PAULA McELWEE: Exactly. And that's got to be the goal. You have probably seen it, some of those raging battles, it's on slide 12, over center control and neighboring centers, maybe in your own center's history, and greed is just never helpful. So greed of wanting or the power for wanting the Executive Director's position has hurt many nonprofits, not just Independent Living Centers. You want to make sure your succession plan helps you avoid that turmoil. So keep that in mind.

>> ROBERT HAND: And I think you mentioned this earlier, but from a lot of the years, both of you and I have done this, I think this is point in an organization's history where most damage tends to occur. Very strong ‑‑

>> PAULA McELWEE: It can set you back for years.

>> ROBERT HAND: Yes, very strong organizations don't have this plan worked out well, and when the Executive Director leaves, somehow before another strong one comes in, horrendous damage can be done.

>> PAULA McELWEE: It is really difficult in a community to continue to do services effectively if you're busy putting out the fires created by somebody who is being negative about the transition. So it's really important to figure it out, put it in writing, keep it matter of fact, make sure you have policies and procedures to support it so that your board has a place to go and kind of get those guidelines and go through that. And so that all the staff together understand what their role is during a transition so that you avoid the turmoil. Because planning can avoid this turmoil, and failing to plan ‑‑

>> ROBERT HAND: And your point, Paula, on that last one, of make sure everyone on S&P understands, I think that's again something that's easily not thought out. You know, you have this plan of what people ‑‑ what's going to happen at the board level and stuff, and then I've seen it, as I'm sure you have, where some staff member just thinking they're helpful suddenly starts doing things that they shouldn't be doing, thinking that, oh, an interim is not going to be able to do it so I'll just take care of this. They don't really know what they're doing either, and then you have more problems.

>> PAULA McELWEE: And a board member, too, you'll find sometimes board members maybe with pure motives but they come in and want to help out with something, and it can become very problematic.

I think this might be a good place to mention that because there's a tape of this available, and you can play it for your board if you need to at some point, but this might be a good place to mention that sometimes this is where the board chair is not clear that the board chair's role does not mean taking over on the day‑to‑day operations, and the chair is often wanting to do the best thing, but I've seen some of the best people become ‑‑ get into the middle of the battle instead of helping with the planning. It's real important that everybody knows what their role is and that you don't confuse those issues and that the board chair understands, no, you're not expected to come in and run the place. Here's the plan. And it just ‑‑

>> ROBERT HAND: You're expected to make sure the plan is carried out.

>> PAULA McELWEE: Perfect. Yes, yes. Stick with the plan and make sure the plan gets carried out. So that's an...

Let's kind of shift a little bit to the requirements for the position itself, some of those requirements you might have. This is on slide 13. And I have been very startled to realize how few center boards fully understand the consumer control requirements for staff. So this is important. They know that 51% of the board, usually they know, that 51% of the board must be people with significant disabilities. That's the language in the act. But don't always realize that 51% of the decision‑making staff must be people with disabilities in addition to 51% of the rest of the staff. So for a while it was combined and some centers are still back decades ago when that was the case and have not realized 51% of decision‑making staff also must be people with disabilities. If you only have one or two management staff, then that means they both have to have a disability, 51% of 1 is 1 and 51% of 2 is 2, until you get to 3 or more you're talking about everyone has to have a disability, and in smaller organizations, the board does not always know and understand that. That's an interesting piece that if you're not clear on this, you will see my email at the end and Bob's too and we can have more of a discussion about that, but I've been surprised how many centers are not clear on the fact that it's not just 51% of the whole ‑ it is also 51% of the decision‑makers.

>> ROBERT HAND: And I certainly think that's true of board members. They didn't even know who their management staff was. So there was no way they could see are we meeting that criteria or not.

>> PAULA McELWEE: So you can look at your own policies and organizational chart and see if you're making it clear who the decision‑making staff are. Sometimes it's several people. Sometimes it's not. And then also the requirement for consumer control. The board needs to know and understand that as part of the transition.

Another interesting piece that most centers don't realize is that the independent living administration must affirm it's a selected interim director candidate is qualified. Now the word "qualified" here is an interesting one because this is in your contract language for your center that they have the right ‑‑ they have the right to make sure that they're working with the ‑‑ that the key personnel are qualified. When we were under RSA this was talked about a lot more. It was a fairly recent interpretation, maybe two years ago, that kind of took a lot of us by surprise, but it is actually in the contract language. So it is always good to let your program officer, whoever your program officer is, at the Independent Living Administration within ACL, let them know who has been hired, and so that should be part of your process, part of your turnover is you've got to make sure that the ‑‑ that they agree that your Executive Director candidate you have chosen is qualified. Now, this is kind of like when you justify a budget item. So you described in your narrative why it's reasonable and necessary is the language used there. You're doing kind of the same here. You're letting them know that you selected a candidate, that you have a target date for them to start, and they are qualified to because, and then you just put it in that email, send it off, and usually this is not a big issue. But it's important for you to kind of take a look at that and know that somebody has to let your program manager at ILA know about that. If you're a Part B center, typically you're letting somebody at the state level, at the DSE, know why you have selected the candidate and why you feel they're qualified. And then that usually takes care of that little extra piece. But a lot of people are not aware of that piece. Also sometimes you've created a job description and you submitted it with your grant and it gives requirements for the position, and what a lot of centers do is that they continually revise that job description to match the actual person. So, you know, the job description says that the person has to have a degree in rehabilitation ‑‑ mine is in rehabilitation administration, and Bob's is in rehab counseling, and so you have this job description that says that, but you could very easily find a qualify person who doesn't have that specific requirement. So make sure your job description and the job announcement you have are approved as part of your grant and that they make sure that the requirements are not extraneous. Make sure it's a good fit, but make sure it's open enough to find somebody who is a great candidate for your center. Don't be so specific in what that degree is or whether you have to have a degree. Don't be so specific that you exclude some really fine applicants to the position. Do take a look at that.

>> ROBERT HAND: The other thing, I think, that is probably important there is well, of course, you should notify RSA as soon as the position is open, but you probably want to have your board look at your job description. Sometimes I think there's been executive directors who have been around for 10 years, 20 years and job description they were hired under, and just maintained, really doesn't cover where your organization is now. So you want to make sure, as you said, you don't have extraneous stuff. If you are hiring somebody new, they should ‑‑ that job description should really reflect what they're going to ‑‑

>> PAULA McELWEE: What are they going to expect in the candidate.

>> ROBERT HAND: Right. Because your previous Executive Director who has been there a long time, you have picked up new programs, they just know that. So nobody bothered maybe putting anything in about the new requirements in the job description.

>> PAULA McELWEE: So they also know certain programs that might not be listed.

And on 14 as we mentioned, NCIL, APRIL and ILRU do post job openings for the top positions, and your state VR office is another good place to post those jobs, and you see Bob's list there. If any of you have others you would like to supply, we would be glad to ‑‑

>> MARY OLSON: I just wanted to jump in here for a second. I have a couple questions from Jill on the chat room, if this is an okay time.

>> PAULA McELWEE: Yes.

>> MARY OLSON: Jill is wondering, first off, is it your suggestion for agencies that would not have enough staff to have a backup to work with another center?

>> PAULA McELWEE: Go ahead, Bob, jump in.

>> ROBERT HAND: I think that's a good way to do it. You have to be creative in how you're going to do it. So if you're a little larger, you may be able to do that solely internally. But if you're smaller, working with another organization, I think could work well, as long as your requirements are very clear.

>> MARY OLSON: Jill is also wondering, what would you suggest when a board has been given 90 days' notice and does not have the notice as part of the process to hire a new ED. How should a center deal with that to make sure the new ED hired fits the organization needs?

>> PAULA McELWEE: Read that one more time. I'm not sure I get that.

>> MARY OLSON: What would you suggest ‑‑ a board has been given 90 days' notice and does not have the ED who gave the notice as part of the process of hiring of the new ED. How could a center deal with that to make sure the new ED hired for the organization. It sounds like to me ‑‑ Jill, I guess that's right ‑‑ is wondering, let's say that the ED is gone already, how do you go about hiring the new director, especially since that old ED, they know how the organization works and who would fit.

>> ROBERT HAND: It sounds to me like the question isn't just only if the old ED is gone. I mean, I've definitely seen situations where an Executive Director is in perfectly good standing, and this has happened to me, and you give notice and say I'm going to be leaving, give 90 days or more, but the board does not want the Executive Director's part of the process. They want to do it all themselves.

>> PAULA McELWEE: As far as what to do about it, yeah, the board does have that ‑‑ the right to make that decision, but I think you want to have the board talk to somebody ‑‑ you know, Bob and I are available. But the board probably ought to talk to somebody and think that through. And then as an Executive Director, you can also make sure that your succession plan addresses that specifically. Maybe more specifically than our examples here have. Or your policies and procedures address it specifically so that ‑‑ at the time you're making your resignation would be a good time to say, my expectation is that I can help you with A, B, C, but at the point that you begin interviewing potential applicants, I will not be sitting in on the interviews. I might suggest some questions you consider, but you'll need to put your own questions together. I may ‑‑ I may suggest some ideas to you about consistency so that you're treating all of your applicants fairly just to remind you that you need the same questions for each group or whatever. Or for each applicant. But if you can outline as an Executive Director what you would expect to help with, it helps them to say, oh, okay, good, that you're not trying to take over the process from the board, but you are willing to support the board, and here's how far that support will go, and then the board are on their own ‑‑ the board is on their own. It's all clarifying that what's expected of each party that we think is so important about what you do. That's why you have job descriptions and policies and procedures and plans is to clarify it. So the earlier you can clarify that expectation the better. If you want somebody who can advise the board about that, we would be glad to do that.

You know, I have seen situations where the board ‑‑ the Executive Director is in good standing, gives the 90‑day announcement, but the board is so anxious to get somebody in place before the person leaves that they do just kind of go into a different mode and they need to remember, okay, this support is still available to you. You know, we can have the administrative assistant send out all of the reference checks, or we can have them make a list for you of the phone numbers for the reference checks for the candidates that you choose to narrow it down to, or whatever support you're going to offer. I don't know if ‑‑ there is nothing you can do if they still decide they're not going to let the Executive Director be a part of it, unfortunately. All you can do is make it clear what support that you would actually offer to them.

>> ROBERT HAND: I think, Paula, that idea of suggesting the go through ILRU is a good idea because when you're the Executive Director, or even another management staff, often the board doesn't want to take your advice in those situations. Sort of that outside expert giving that advice, I think they're less defensive about.

>> PAULA McELWEE: It does help to make things go more smoothly. One of the things you need to think about as executive directors, those of you who are executive directors, is does your board even know where they can go to get such resources? If you help them to know that now, you can go to ILRU ‑‑ ILRU.org and tell them, you know, go down to the bottom left and get on the mailing list and take a look at some of the board resources that are there for training. If you're providing resources to them on a regular basis that come from our Web site saying, hey, have you seen this link on this part of the board process or whatever, those are helpful to them, and then at least they know there is a National Network that they connect to so ‑‑ same thing with NCIL and APRIL, you can make sure that they're aware of that, make sure that your board members go with you to conferences. Make sure that they know that they're not alone, that there is a network of Independent Living out there that can be supportive to them, and I think that's one of the best things you can do for your board to help make sure that that happens.

Now, one of the things that we mentioned in our PowerPoint is to include a criminal background check in your hiring process. Maybe you do, maybe you don't. Be there is some argument about when it would or would not be considered reasonable and necessary for the use of federal funds, but I feel very strongly that even if you think you know the person really well, you shrewd include a criminal background check for the key positions that have to do with managing money. I mean your Executive Director, finance manager, maybe your program manager. Whether you do it for all positions or not. Because you want to show due diligence. You want to show that you're paying attention. So when you get down to the nitty‑gritty of hiring, there are some last‑minute steps there, and one of them would be to include a criminal background check for the person that you know ‑‑ that you make an offer to and you make it contingent on several things, and I would suggest that this is one.

>> ROBERT HAND: Paula, I wouldn't disagree with that, but I would suggest, if you're able to have access to a labor attorney to get their advice on it because we have been told by ours that we do do criminal background checks for some positions, but you have to be careful, because there's some things that you cannot hire a not hire a person for ‑‑ cannot not hire a person because of that. Governments have put in‑laws to try to get people who have made mistakes in their lives back into the ‑‑ being able to make a living, and so there are some regulations concerning that.

>> PAULA McELWEE: That's good to mention. And that's true. The hiring process ‑‑ there are state regulations in every state that are around these issues, and you need to know what your own state does, and that's why it's always good to have an attorney who knows HR law well and to talk to that attorney when you're making any of these key decisions around the process. Because they are going to know what is or is not true in your state.

>> ROBERT HAND: I think before the interview process starts going over with your board ‑‑ I think most people anymore understand the laws dealing with discrimination, but you may have board members who have never hired anyone before in their lives to remind them that there's things they can't ask.

>> PAULA McELWEE: In fact, the disability question is such an interesting one for Independent Living Centers. Because you often have a situation where the person must have a disability, it's a small organization with just one person in leadership, and yet they can't ask that question. They can give the person an opportunity to offer it, and what I suggest ‑‑ the question I suggest is, I suggest they tell them, you know, we're required by federal law to have a person with a disability in this position. Tell them that at some point. But then ask a question about their personal experience with disability without asking did they have ‑‑ do they have a disability. Then they will reveal it or they won't, and you'll have to deal with that, but even telling them that, you can't ask the person if they have a disability, but you can only hire somebody who has a disability. It's very confusing for board members.

>> ROBERT HAND: And our labor attorney has told us, he has given us this little scenario, and no one should take this as legal advice from me, by the way, but what he has told us we can do in all of our hiring is to say, we can't ask if you have a disability, but having a disability is actually an advantage to being hired here. So if you want to choose to tell us anything about that, you can.

>> PAULA McELWEE: That's well said. Because disclosure from the person's own choice is not a problem, but to ask directly is.

>> ROBERT HAND: Right.

>> PAULA McELWEE: But those are the kinds of things your board will not know. So whatever you can do to help them through that process is important.

I also have a ‑‑ like a board checklist that I used, that I provide to boards when they ask me for it, that includes some of this, and I have some sample interview questions that I sometimes ask. So if either of those is helpful to your board, if they find themselves in a point of transition ‑‑

>> MARY OLSON: I have one more question from Nicole Craig, and she is wondering where the information can be found regarding the need to notify a DSE once an ED is hired.

>> PAULA McELWEE: It's in the contract language, and the contract language from HHS to the DSU for the pass‑through monies and HHS to you for your Part B monies. It actually says that the ‑‑ that you must have a qualified person in leadership. If you drop me a note, I can look up that exact reference. I've got it for you. But I don't have it off the top of my head. So drop me an email and I can give you that reference. But it took us all by surprised, and we ‑‑ we are just helping you to know that that's something that's expected after the fact, is not as pleasant to deal with. So it's always good to have that in place, but, yeah, we can get it to you. Just drop us a note.

HHS ‑‑ it doesn't appear that HHS will be as consistent on that as the Department of Education was, but not enough time ‑‑ not enough water is under the bridge yet. We don't have regs yet. So at this point we're going forward with that since the language still applies.

Any other questions, Mary?

>> MARY OLSON: Not yet.

Again, if you're on the phone, you can just push star 2 and that raises your hand and we can make your mic live. Just keep typing away in the chat room. That's it for right now.

>> PAULA McELWEE: Just a couple more thoughts for you. On slide 15, be sure that your board approves your plan. The Executive Director is going to end up developing it, and you really should present it to your board for approval. I've seen the situation, unfortunately, where the Executive Director created a succession plan, talked it over with staff, didn't never take it to the board. I'm not sure if she was reluctant to or if there just wasn't time during her transition and she just didn't get it done, but they up‑ended it entirely. They weren't involved in the discussion, so they just decided they didn't like that succession plan and they started from scratch, and that really wasn't helpful. Because there were a lot of things in the succession plan that would have helped them through the transition process. But because they hadn't been involved in it when it came up, they didn't like it at all. So if the board is not sure of some of the elements in your plan, if you can't work it out, as easily ‑‑ if there's an emergency later, everybody is kind of scrambling and not counting on that document, it's a lot harder to deal with.

If you think there's going to be internal controversy about ‑‑ around the appointment of an interim ED, you can work that out in executive session and keep the discussion around, "I think this person would be a good interim person." You can keep that under wraps and then let the board appoint that person when the time comes. But it should be clear that those are board decisions, who is hired for the interim and who the successor is, both are decisions of the board, and you don't actually get to make that decision, even if you're grooming somebody you think would be excellent for that position, it's not your call to make. It is the board's call to make. And I've seen it backfire many times when the Executive Director jumps in and tries to make the decision for the board. I've also seen it work very smoothly and very well when the board is included in this process and they agree to the plan and it moves forward very smoothly. Did they agree with it as it was presented? Maybe not. But they were at least part of the ‑‑

>> ROBERT HAND: We just say that that plan is a policy of the organization, and so as a policy, the board is the one who approves it.

>> PAULA McELWEE: Right. So the board is approving the policy and it's available for people to see.

>> ROBERT HAND: Right.

>> PAULA McELWEE: That's really a good way to deal with that.

Sometimes I see executive directors who are glad to do this, but sometimes I see executive directors that are not really wanting to do this. They just want the board to do it without them. So we've put together some suggestions for you on slide 16 about why this is the Executive Director's job to help push this forward, to have some kind of a succession plan presented to the board for their approval. And just as Bob said, you've built up an organization. You don't want to see it crash just because you're walking away. So think of it as your last gift to the organization that you've worked so hard for even if the board is leaving ‑‑ the Executive Director leaving involuntarily. No matter what the reason, you want your organization to survive and thrive when you're no longer able to be there. Help the board to do this. They may not do it without some prodding because, as we said, when we opened this conversation, not everybody's comfortable talking about the what‑ifs, but if you don't talk about the what‑ifs, at some point it may take everybody by surprise and you don't want that to happen either. They also may change the plan you offer, but at least there's still a plan, they've approved it, nobody is working without the knowledge of what is expected. That's important. And, of course, the board can make changes in any way they want because it's their policy.

>> ROBERT HAND: I think that's a good idea of just saying, here's a policy we need just like all of our other policies, and ‑‑

>> PAULA McELWEE: Great approach.

>> ROBERT HAND: saying that to the board, we need a success plan, and board members getting nervous and "What, are you planning on leaving?"

>> PAULA McELWEE: Yeah, a succession development policy is a good way to word that.

>> ROBERT HAND: Yeah, we need policies on what happens if the place Burns down or all kinds of things to make sure services continue in a high quality, and this is just one of them.

>> PAULA McELWEE: Good sense. So that no matter what happens, whether the ED leaves voluntarily or not, the board has tools at hand to assist them in moving forward. So that's important.

On slide 17 we kind of mentioned this, but if you have a worker and education criteria in way of the good applicants, reconsider them before the applications start coming in. Typically it's something you're revising on a regular basis anyway. As the Executive Director, make sure that you're looking at the actual requirements for the job in a realistic way. And as you've grown and expanded, do those still apply? Do you have new ones that should be added? But keeping your job descriptions up to date so that you know who you're looking for is going to be really important, and that's going to be true for all of your job positions.

>> ROBERT HAND: And that criteria could be good but it could be flexible. We always use, I think in many situations, the one where you require a degree but years of experience can take the place of that. You can still have those requirements in there but have flexibility in how they're ‑‑

>> PAULA McELWEE: How they're applied, yeah. Other considerations, what's preferred and what's required. Look at the language in your job descriptions and make sure of what you want them to say.

And do not, and I know we've said this, I can't emphasize it enough, do not promise or even imply that someone is your chosen successor unless it's something that the board has agreed to as part of this transition. Because you don't get to make that decision. The board does. And so if you have even implied it in a ‑‑ in an employment review, for example, with your program manager and you say I think you're coming along well now, you could do this job for me some day, don't go there, because they will I will take that kind of comment very seriously because they care a great deal about what's ‑‑ what's happening. So make sure that you don't make any promises. It's not your job to make that decision, and that's what you need to say if you're asked.

You know, one thing that's important to remember is that somebody you don't know is not necessarily better than somebody you do. You just know that internal applicant too well. You know their weaknesses. But that's not always a bad thing. So make sure you're interviewing your internal and external candidates in a fair way. I have seen situations where the board was so determined to have an external person, and they did, and they hired somebody, and the person didn't last six months because there were lots of things they didn't know about that person when they hired them. And then there are go‑to person was that internal applicant that maybe they should have considered before. Saying that you have to go through that process of hiring an applicant who isn't very effective and letting them go before you consider whether that internal applicant might really be very effective person for the job. So you're balancing all that. Just help the board remember that you know more about that internal applicant, so how can you judge fairly. I don't know if that makes sense, but ‑‑

>> ROBERT HAND: I think it does. And I think it applies in a broader sense, and getting with your board before the interview process starts and saying, you know, it's very natural for people to have personal agendas in what they look for. We need to make sure and remember that we should all be agreeing on these are the criteria and not applying our own side or hidden criteria.

>> PAULA McELWEE: We strongly recommend that you help the board come up with their questions and that they always ask the same questions. Some of them can be open‑ended and go interesting directions. So different applicants might answer them with different information, but help them to have a good list of interview questions that they use consistently with all of the applicants that they interview.

Let's recap on slide 18. Some of the elements of the succession plan include who is going to do what during that either short‑term absence or the first 30 days of absence, 90 days of absence. How is that going to happen? That's that clarifying and agreeing on the roles and responsibilities of the board, the executive committee, the Executive Director, who are all the players there and who is going to do what during that period of time?

Then make sure people have the training they need to assume those functions in the short term.

Make sure that you have a process for extending that out as you need to until somebody is hired, or an interim or a successor or both are chosen.

And plan for that transition period because sometimes your current leader is still available to offer some training and support, and sometimes that's a really good situation because they can help the person set up their calendar with what are the meetings that happen on a regular basis. They can go through and say, this is the group that I attend, and this is why I attend it, and this is what they have to offer. So the new Executive Director can decide do I also go to those meetings or not.

And some of that back and forth from the current leader to the successor leader can really be valuable if you can offer that training and support. I've done several interims ‑‑ I have done four, I guess, in California, and in some of those situations I was able to work side by side with the new leader and I think it was a very effective option for the organization because I wasn't there full time. There came a point ‑‑ I only was there full time for like a week or two, but then I was available to assist that person as questions came up or as situations came up where they required a little bit more of the history, you know, and they could continue to have my input as they developed their own solutions to that history.

>> ROBERT HAND: I think it's extremely helpful. It's just the exiting ED must understand they're not making in any decisions anymore and the person may not always take their advice, and that's great. You know, you can't get hung up about that.

>> PAULA McELWEE: And that's hard ‑‑

>> ROBERT HAND: Lot of knowledge ‑‑

>> PAULA McELWEE: Yeah, it's hard sometimes for the parting ED, especially if that person is a founder, which sometimes we have founders right now who are leaving as part of the dynamic of aging out, sometimes it's art to let go and you have to remind yourself as you're making the succession happen that you are not in charge anymore. After that, it's their job, and you are there for technical assistance or training but not to make the decisions. Those are theirs to make. You can't cross the line. If staff are coming to you and saying, we don't like so and so, we don't like what they did, whatever, it's not helpful for you to get involved in those conversations at all. So make sure your support is to the new Executive Director and you're not involved in any of the day‑to‑day functions forward.

That's the end of our PowerPoints. So what other questions can we answer for you or do you any of you have examples you would like to share with the group that you think might be useful?

>> MARY OLSON: Star 2 gets your hand up. You can just type in a question for us.

I'm wondering, gosh, this is the quietest group I have heard. You guys must have them entranced.

>> ROBERT HAND: Entranced or asleep. One or the other.

>> MARY OLSON: Oh, no, I think ‑‑ I learned a lot and I'm excited to get it up on the Web site.

I don't see any more questions at this time. But maybe ‑‑ I'll do one more little spiel and folks have questions, we still have a couple minutes to get your hands up or type in a question for us. Again, if you will evaluate our conversation, you know, we're always looking for ways to make it better, and that evaluation link again is on our Web site under the IL Conversations tab, and that's also where you'll be able to find the archive of this great conversation. It will have the transcript along with the audio recording. And I don't know if I have your contact information up there yet, but ‑‑

>> PAULA McELWEE: If not, it's on slide 20 of the PowerPoint. So they can see it there.

>> MARY OLSON: Perfect. So on slide 20 of the PowerPoint you are able to find information to get a hold of these great presenters. I know for me I always think of questions after it's already done.

>> PAULA McELWEE: Or ‑‑ as soon as you start working on it, then you think of more.

>> MARY OLSON: Yeah. So I guess... I don't see any questions coming up.

Again, I just thank you again, Paula and Bob. I think this has been a really great conversation. And I look forward to hearing more from you. And good luck in retirement.

>> ROBERT HAND: Thank you.

>> MARY OLSON: Yeah.

>> ROBERT HAND: I'm sure I'll be around and still be interacting with you in some way.

>> MARY OLSON: Oh, perfect. Awesome. Well, again, thanks for joining us, folks, and that actually wraps up our IL Conversations for the year, and so look for our next one which will start again after the first of October. We'll be getting a new line‑up out. So thanks, everybody.

>> PAULA McELWEE: Thanks, Mary.