**Leadership: Shifting Your CIL into High Gear**

**Presented by Christy Dunaway, Robert Hand, Bill Henning and Lee Schulz on September 30, 2013**

>> TIM FUCHS: Good afternoon, everybody. I'm Tim   
Fuchs with the National Council On Independent   
Living here in Washington, D.C.. I want to   
welcome you to IL-net's newest webinar,   
"Leadership: Shifting your CIL into high gear:"   
This webinar is presented by CIL-net, a program of   
IL-net technical training for centers and SILCs.   
It's operated among ILRU, NCIL, and APRIL with   
support provided by RSA at the US Department of   
Education.   
So we are recording today's call so that we can   
create an archived version on ILRU's website. You   
and your colleagues can access that within 48   
hours and it includes all of the audio, captions,   
PowerPoint, from today's presentation.   
We will break several times during the   
presentation to take your questions. And, in   
fact, we will do that after each of the questions,   
we'll be discussing with the presenters today. So   
we will have ample opportunity for questions and   
really encourage your interaction and questions   
and feedback.   
We'll also have a final Q&A at the end of the   
call. So I just want you all to know that.   
If you are on the webinar today, you will see the   
chat screen. I see some of you are using it, in   
the bottom right-hand corner. You can type your   
questions in the white text box, click enter and   
they will show up to us. We will see them and   
take them in the order that we receive them.   
For those of you on the phone, you can ask a   
question by pressing star pound, and that will put   
you into the queue, and, again, we will take them   
in the order that they are received. And also I'm   
logged into the captioning screen. On the Closed   
Caption Productions, there's a chatroom there and   
you can put questions in there.   
I want to point out that we have an evaluation   
form for today's call. It's very brief and easy   
to complete, and we're really, really interested   
in your feedback. We take our evaluations really   
seriously, and they are first and foremost in our   
review of our programs, and the program   
improvement for the future. So please let us know   
what you thought. I know a lot of you   
participating in small groups today and that's   
great, but please do fill out the evaluation as an   
individual. We want to know what everyone thinks.   
If you are on the webinar, that PowerPoint you are   
looking at the title screen right now, slide one,   
that will display and change automatically. But   
if you are on the phone today, and you don't have   
the PowerPoint in front of you, you want to make   
sure that you get that now. The PowerPoint was attached to the confirmation email that was sent   
to you with the connection instructions. If you   
don't have that handy for any reason, you can   
email me at Tim@NCIL.org, that's   
t-i-m@n-c-i-l.org. I have my email open in front   
of me. Make sure you have the PowerPoint open   
before we begin.   
Okay. So the only thing I have left to do is   
introduce our presenters and I want to thank them,   
really sincerely for working with us over the last   
few months. We had initially thought of this   
webinar and thought it would be a great thing to   
do, and each of the people that you are going to   
hear from today, actually responded to a small   
survey that we sent out about leadership and   
centers and we were really intrigued by the   
results and it kind of got us really excited about   
this webinar. I know you will enjoy it.   
First, we have Christy Dunaway. Christy is the   
executive director of the Life Centers for   
Independent Living in Mississippi. We have Bob   
Hand and Bob is the executive director of   
Resources for Independence of the central valley,   
in and around Fresno, California.   
We have Bill Henning with us. Bill is the   
executive director of the Boston Center for   
Independent Living. And finally we have Lee   
Schulz who is the president and CEO of   
Independence First in Milwaukee, Wisconsin.   
So to all of you, thanks again for your hard work   
on this. I'm really looking forward to this and I   
will turn the floor over to Lee and I will go to   
slide two. Lee?   
>> LEE SCHULZ: Well, thank you and welcome,   
everybody.   
If we are successful today, after this training,   
you will be able to describe the differences   
between management and leadership. The overlap   
between the two and the implications for CIL   
operations. Also, you should be able to describe   
the critical success factors for an effective CIL   
leadership, and you will be able to identify   
strategies to elevate your leadership abilities,   
including ways to improve listening skills when   
dealing with consumers, staff and the community.   
And lastly, you will be able to describe the best   
practices for preparing the staff members to   
increasingly higher levels of responsibility.   
With that, we will start today with Christy   
Dunaway who is going to describe the differences   
between management and leadership, and overlap   
between the two and the implications for CIL   
operations. Go ahead, Christy.   
>> CHRISTY DUNAWAY: Thank you. Good afternoon,   
everyone, this is Christy Dunaway.   
As Tim said, I'm the executive director of Living   
Independence for Everyone of Mississippi. We   
operate six offices here in the state. So when   
they asked me if I would consider participating on   
this, and working with them on this webinar, I   
agreed to do it, not necessarily because I have   
figured out the difference between management and   
leadership myself, but I just wanted to point out   
that management and leadership are very difficult   
to distinguish between the two.   
When I went and looked up the definition of both,   
I realized quickly why I have always had trouble   
with it and you probably have as well. Wikipedia   
defined management as the active coordinating of   
people to accomplish desired goals and onives   
using available resources efficiently and   
effectively.   
Management is comprised of planning, organizing,   
staffing, leading, or directing and controlling an   
organization, a group of one or more people or an   
effort for the purpose of accomplishing a goal.   
Leadership is defined by Wikipedia as a process of   
social influence in which one person can enlist   
the aid and the support of others in the   
accomplishment of a common task. Although there   
are also other in-depth definitions of leadership.   
Leadership is organizing a group of people to   
achieve a common goal.   
You notice the similarities. And that's why it's   
often -- as soon as I realized that, I realized   
why it was often difficult to manage when you   
should be leading or leading when you should be   
managing.   
As the director of a center, my board members, the   
community, both disability community and the   
general public, my funding sources, all of my   
staff, they all expect me to be a leader in   
advocacy efforts. It takes a lot of time, it   
takes a lot of skill, and you are serving as a   
role model, a person that the staff members can   
look up to.   
When you are managing, it means that you are being   
responsible for staffing the center for   
independent living. And it means handling or   
being aware of disciplinary platters and ensuring   
that the programming staff are performing the   
tasks that you are signed to them, as well as   
having the responsibility for all of the daily   
activities of the center, like getting the bills   
paid, bringing in the money for the programs,   
et cetera.   
And so it's -- it's a lot to do.   
What we figured out here in Mississippi was that   
it was difficult to both manage and to lead and to   
serve as that role model for the staff and the   
consumers if you had disciplinary supervision over   
9 staff. So what we did here, to make it easier   
for both myself and my staff members, they all   
know that I'm still the executive director of the   
independent living program, but I am no longer in   
charge, necessarily, of personnel. We have put   
our assistant director and she's the acting   
director when I'm not in the office, but the   
assistant director now serves as our director of   
personnel. She enforces personnel policies. She   
handles all the disciplinary actions and the staff   
issues, et cetera.   
It keeps me the one who is perceived as being the   
leader. It keeps me one step removed from all the   
disciplinary action, and it makes it easier for   
the staff to work beside me when we're working on systems advocacy issues in the state.   
While I'm still ultimately responsible for   
personnel and other day-to-day management issues,   
obviously, the staff are interacting with me   
mostly with -- they see -- they are interacting   
with me as the leader of the organization and not   
necessarily the personnel or the human resource   
person. So I'm still the director of the   
organization, but I have turned personnel issues,   
human resource-type issues over to the assistant   
director and that's worked really very well for us   
here in the state of Mississippi. So's just a   
suggestion.   
Our board members should always be involved   
actively in determining our role. My board   
realized -- they saw the problems that we were   
having with me, both managing the Center for   
Independent Living, and being responsible for all   
the staffing issues and also trying to lead. So   
they are actually the ones who -- we approached   
them with the idea of turning the personnel issues   
over to the assistant director. However, because   
it's difficult to do both, you have to be both a   
manager and a leader. So you need to ensure   
absolute fairness.   
You know, the entire philosophy of independent   
living is based on the equality of all people.   
You have to make sure that your personnel issues   
are clear, concise and followed in every   
circumstances.   
So with that, I'm going to turn it over to Bill.   
>> BILL HENNING: Yep, thank you, Christy.   
>> CHRISTY DUNAWAY: Sure.   
>> BILL HENNING: You know, when I think about   
leadership and management, I would just let folks   
know, I have been doing this in one way or another   
over 30 years, and disability rights since 1984.   
I'm sitting here thinking about it, and it's   
really like a journey, and at some point, you   
hopefully acquire enough knowledge from -- by   
talking to other people and I think it's important   
to note, even though it's not on the notes here,   
in learning from your -- learning from your   
mistakes. I probably have made every conceivable   
mistake there is, many two or three times. And,   
you know, we are here presenting, but I think -- I   
suspect all of us have had some tough times in the   
management and it's very hard. It's very hard in   
independent living around, you know, oftentimes   
there are personnel issues and Christy had some   
great ways how they work on them, but it -- you   
will get battle scars if you are in this field,   
and that's okay. And oftentimes I will say, do as   
I say, not as I do, because it's constantly being   
challenged.   
It's real important and I really learned this many   
times that you have to give real high attention   
directly and through delegation to critical   
structural elements of your organization. You   
have to build a strong work environment. I used   
to be real big on we're doing it are to the cause.   
We're doing it for the freedom of our brothers and   
sisters and I still believe in that ethic very   
strongly, very, very strongly, but the people who   
work in your office every day have to put food on   
the table. Have to pay the rent, have to have a   
good work environment as they slog through the   
daily grind. Some days it's not that easy, you   
know, it's data entry. It's dealing with   
difficult consumers. You know, there's lots of   
rewards in this, helping people to live   
independently, but you've got to create an   
environment where people are productive, can feel   
good about themselves and feel part of a team.   
So you've got to have things such as good   
personnel policies, review them periodically. You   
have to have good staff and consumer feedback   
systems, sufficient communication means and good   
office equipment. No small deal. You have to   
have computers that work in this age and be able   
to access the Internet and the cloud and whatever.   
I don't even know all of it, but I know my staff   
need it, demand it and deserve it. And you have   
to broadly speak compensate people well. Not   
every center is vested with great resources but   
you have to respect people. You have to try to   
pay well. You have to have vacation time, a   
disability policy, if you can afford it dental   
insurance, health insurance, vacation. Even   
retirement plans, whether you pay in or just give   
people access to a 501 whatever it's called -- a   
401(k) or whatever it is. You know?   
You've got to treat people as employees.   
Now, in our field, being a leader in disability   
rights, I would emphasize quite clearly, you have   
to be on the front lines in some way. You have to   
know about the services you are providing. You   
also have to know about the issues you are   
pursuing in this systemic advocacy field. So this   
is where management and leadership play look a   
little bit different, because part of it is just   
being very mission driven. You have to do the   
management to make sure you get to the mission.   
You have to have the mission so that people are   
working for something solid and a goal, but you as   
a leader have to know it.   
I have been in forums where, you know, you may not   
see the leader of an Independent Living Center.   
Recently there was a forum in -- we were   
discussing big issues in the state and a number of   
leaders weren't able to make it. I think they   
were all good reasons. I'm not making a critique,   
but I know a number of people brought up the   
issue, well, where were they? Where were the   
other leaders? I happened to be there. I'm not   
making a critique, because everyone has busy   
struggles. It's illustrative of how people play   
out. If this was a big meeting, where were these   
people? Again, they were probably doing more   
important stuff in their minds and it may have   
been.   
But connecting to issues that are out there is   
real important. You can't be a leader if you   
don't know, eat, sleep and drink this stuff to   
some degree.   
You have flare, that's all the better. If you are   
dramatic, if you are on the front-lines of a rally   
or a protest speaking at your state house or city   
hall or wherever, great, but it doesn't always   
have to be that way. Sometimes it's quietly just   
being present. Leadership isn't always the   
dramatic, but it's real important. I have just   
don't believe you can separate the mission from   
the practice. Of being a manager. If you are not   
taking care of the good, internal -- the important   
internal structural items.   
And all of this, communication is important. It's   
fundamental.   
It gets said a lot. I think one of things that I   
do, they read the business pages and the   
newspapers and some people go online. But they   
often have articles or stories of people who are   
successful managers and one thing they will always   
talk about is communicating. Communicating   
directly to staff, communicating a bigger message.   
As a leader, you are the primary medium for   
communication to people, in lots of ways. And   
that's real important. Whenever I've had   
problems, it may not be because I'm doing the   
wrong thing. It's because people don't know. I   
probably haven't effectively communicated what's   
going on to other managers or to line staff or to   
board. You know, you don't want to over do it,   
but for the most part, you can't communicate too   
much. Again, don't slobber it on, but tell what's   
happening. Tell what's happening, and I think   
that's really, really important thing to keep in   
mind if you want to be a leader in any kind of   
way, communication.   
Any questions?   
>> TIM FUCHS: All right. Thank you, bi. Thank   
you Christy. We will open it now for questions.   
Just as a reminder, you can type your question in   
the bottom right-hand corner, in the chat box. If   
you are on the telephone today, you can press star   
pound to indicate you have a question. Or you can   
type your question in the chat box on the CART   
screen as well. So I will give a moment for   
people to type those questions out.   
I don't see any now, so I will give people about   
20 seconds to allow people to think of a question.   
And, again if you have a question on the   
telephone, you can press star pound.   
And here's our first question coming in from the   
web, Maureen Ryan is wondering, Christy, does your associate director also do systems advocacy work   
in.   
>> CHRISTY DUNAWAY: Yes, she does. She does, but   
she's always there beside us, if we are up at the   
state capitol or going into meetings with   
Department of Health, mental health, whatever.   
She's always right there beside us but I'm usually   
the one that's taking the lead, unless for some   
reason, you know, if I have an illness or   
something and I simply can't be there for whatever   
reason, then she will take over for me. But, yes,   
typically, she's right there beside us.   
>> TIM FUCHS: Great. Thank you.   
Okay. Just give a few more moments here.   
>> LEE SCHULZ: Tim, this is Lee. Can I ask   
Christy a question?   
>> TIM FUCHS: Absolutely.   
>> LEE SCHULZ: Christy, in your split between your   
role as director and HR, you have turned those   
responsibilities over, but I will presume that you   
haven't turned over hiring responsibility.   
>> CHRISTY DUNAWAY: No, but, she's again, right   
there beside me too, when it comes to hiring. We   
have a position open now, and we went together to   
the office and interviewed seven or eight people   
last week. So I will always be involved in the   
hiring of people, and I will always be involved in   
firing, as well, but the disciplinary in between   
those two things, she takes care of.   
>> LEE SCHULZ: Thank you.   
>> CHRISTY DUNAWAY: You're welcome.   
>> TIM FUCHS: Okay. I'm seeing a little bit of   
activity on the chat, but nothing entered yet.   
You can press star pound if you have a question on   
the phone.   
We will give it just a few more seconds and if we   
don't get any questions then we will go back to   
the presentation.   
>> BILL HENNING: I see a question that has popped   
up, Bill.   
>> TIM FUCHS: Thank you, Bill. I was looking at   
my notes. Okay, let's see, the next question   
comes from Nayana Shah. Is this true with Bill   
and Lee's centers having an associate director.   
Do you employee associate directors as well?   
>> BILL HENNING: We have an assistant -- a deputy   
director, as it's called. I'm sure the function   
is similar and it's a person would oversees a   
couple of programs, yes, in my absence, but it's a   
person, Lee knows him, Courtland Town who is an   
outstanding thinker, program manager and it's very   
much a team effort what we do. I think if you can   
have somebody you can highly trust and who is   
highly competent as I have, it really makes for an   
effective management system.   
>> TIM FUCHS: Good. Lee?   
>> LEE SCHULZ: Well, I had an associate director   
and that person resigned a few months back and we   
are actually going to replace that position with a   
COO and that person will be in charge of all   
operations. I'm going to kind of retain finance   
and HR. So that's a little bit different than   
Christy's arrangement.   
>> TIM FUCHS: Okay. Thanks. How about you, Bob?   
>> BOB HAND: I don't have an assistant director,   
but in some ways, I think work, as Christy was   
talking about, because I have program directors   
and I always work with them saying, it's best to   
handle personnel issues at the lowest level   
possible.   
So hopefully most of them aren't coming up to me,   
but they are dealing with them at that level. And   
then only if it gets really severe does it come up   
to me.   
>> TIM FUCHS: Okay. Good. Thank you.   
All right. Our next question comes from Marybeth   
Luby, and she asks, I believe staff should attend   
meetings alongside management when appropriate. I   
feel it helps staff to do -- to have different   
roles of responsibility, do you agree? Christy,   
do you want to respond to that?   
>> CHRISTY DUNAWAY: Sure. Yes, I absolutely   
agree, Marybeth. My staff are always with me,   
especially if it deals with their particular   
program. If their program is funded by, you know,   
the department of rehab services or the Department   
of Health, then the program manager is going to go   
with me and those staff are going to go with me.   
So I absolutely agree. We actually touch on, that   
I think, a little bit later on in the   
presentation, but that's the best way, really, for   
staff to learn, how to become leaders is, you've   
got to get them involved and you've got to give   
them the responsibilities. So I agree with you   
completely.   
>> TIM FUCHS: Great. Great. Okay. Another quick   
question for a number of you <!32768> Patt Kosier.   
For those of you who have an associate assistant   
or a deputy director, how many total staff do you   
have? Christy, do you want to start?   
>> CHRISTY DUNAWAY: Yeah, we have 28 staff members   
and then we have another 20 Americorps members.   
>> TIM FUCHS: Is that among the --   
>> CHRISTY DUNAWAY: Yeah. Well, the Americorps   
members are spread out across the 28 offices and   
the 28 are spread among the six offices we have.   
So it's definitely enough to warrant two people in   
charge.   
>> TIM FUCHS: Yeah, yeah. Okay. How about you,   
Bill?   
>> BILL HENNING: We have approximately 35 staff.   
I have a couple of positions in flux and we also   
have in our attendant program a number of people   
we hire on contract labor. So we might be   
connecting with 50 people, and we -- I have an   
assistant director, as I said. But when I was   
director of a smaller center, with I think 14   
staff, I also had an assistant director as well.   
I found it to be effective, though it's often   
person specific. It's got to be somebody I can   
sync with very well.   
>> TIM FUCHS: Mm-hmm. Good.   
Good.   
Patt is wondering about funding as well. I know   
your funding sources are sure to be varied. In   
the interest of time, I know you are all federally   
funded. Any other major sources of funding that   
any of you would like to highlight? Or sources of   
funding that you have been able to determine to   
pay for those assistant director roles?   
>> CHRISTY DUNAWAY: This is Christy. Well, yeah,   
besides our independent living grant from RSA, the   
assistant director is considered to be the program   
officer over two of my other projects and so part   
of her salary comes from those two. One is from   
the Department of Health, and it's to serve our   
youth with disabilities under 21, and that's   
Title V money, and the other is the Americorps   
program, and that's funded from different sources   
but in part from our partners that we have on that   
program.   
>> TIM FUCHS: Very good. All right. Thanks.   
Well, we are going to have a number of Q&A breaks   
later in the program. So we're going to get back   
to the presentation now, but if you have a   
question, you can continue to type them in the   
chat and we'll put them in the queue for the next   
Q&A break and the same with the telephones as   
well.   
So I'm going to turn it over to Lee to introduce   
the next discussion question. I will click to   
slide 15. Lee?   
>> LEE SCHULZ: Thank you. Bob Hand and I will   
then cover the next section and this is to   
describe the critical success factors for   
effective CIL leadership. And we will start with   
Bob taking over.   
>> BOB HAND: Okay. Great. Thanks, Lee. You   
know, as Christy mentioned earlier, I think   
there's so many things that all of us know. It's   
hard to pick out very particular things and I have   
worked helping out a number of different   
Independent Living Centers and so many of us are   
radically different in the way that we operate,   
but I did just pick out a few ideas that I think   
might kind of go across the board. And one of   
them is what, in a way, Bill was talking about   
earlier, I think of knowing the system. And here,   
more than the advocacy part, I'm talking about   
knowing how your center operates and it just   
sounds so basic, but I have seen a number of times   
where executive directors were so concentrated on   
things like advocacy, that they didn't know the   
regulations that they had to follow. You know,   
they didn't know the funding. I have worked in a   
number of areas and I have to say, I have never   
seen anything as complicated as the independent   
living regulations and the way we have to follow   
them.   
And, of course, California, we always like to add   
our own regulations on top of all of the others.   
So maybe ours are worse. But in all of those   
cases, I think it's just critical that you keep up   
with what's happening in the field. And, I mean,   
keep up with it. Sometimes we learn it, and we   
learn what's going on right then, at that point in   
time, but things change, and sometimes they change   
very rapidly. Sometimes new regulations are put   
in, and we kind of set them aside and say I'm too   
busy right now, but these are the things that   
could make the difference between whether we stay   
in business or not or whether we are effective or   
not.   
So to me, that's one of the real critical areas.   
And then going to the next slide, this is   
something that I have always found really   
important. Some Independent Living Centers I have   
seen have kind of seen themselves as it's us   
against the world. And that's great if you can   
win that way, I guess. But I have always found   
that a hard fight and would much rather be making   
friends among the communication. So it's   
something that we're -- in our area, we are known   
as the group that pulls in everybody else, would   
contacts everybody else, who cord fates all issues   
that deal with disabilities.   
There was a question about having staff on other   
meetings and I can only do so much and be on so   
many groups. So we have a lot of different staff   
who are on committees throughout the area. And I   
try to keep in contact with as many of my   
community contacts as I can. Sometimes I will   
look and say, well, you know, here's an executive   
director of UCPs that I haven't talked with in a   
long time and I will just invite him out for   
coffee and meet. And go, hey, you know, just   
catch up. Find out what's going on, because I   
know somewhere down the road, I may well need him   
for something. And if I have left those   
connections slip away, then when I do need it,   
it's not going to be there. That's, of course,   
particularly important with elected officials,   
and, again, we spend a lot of time -- and it's not   
just me. It's various staff keeping in contact   
with all of the elected officials and all of their   
staff to know what's going on. So I think not   
looking at ourselves as a center that we're right   
here, we're right in this spot, but rather almost   
as a system within the community, and so we do   
every bit as much out in the community as we do   
here on site. I think in our business, that's   
really critical.   
The next slide then is developing a sustainability   
plan. And I think we're talking about this later   
in regard to the executive director, and I think   
that's important, but for me, it's about all of   
the positions.   
One of the things that we found here is we have a   
lot of different, very specific programs. We have   
the general independent living, but through   
various funding sources, we have a lot of   
specialized programs, and only certain staff know   
that and know how to do it. And so we found times   
for whatever reason, some critical staff person   
leaves and then we're scrambling trying to figure   
out how to maintain doing what we do.   
So we have developed a plan where every six   
months, every staff person has to take a look at   
their job description, and sign off that they have   
taught at least one other staff person all of   
those responsibilities. And I know that that's   
tough. In some cases, you have several staff, and   
it's not a real issue. But we have some that are   
very, very specific and so we always identify   
someone. And if they don't know someone right   
off -- typically, it's somebody else who is   
working right with them, but if they don't have   
that, then I will help them identify somebody and   
say, make sure they know this information.   
And, of course, they are not going to know all the   
details, but they need to know where the   
information is, where to go look for more, who to   
contact if you don't know what's going on, because   
sustainability is a real key.   
And, again, in kind of helping out some other   
Independent Living Centers, one of the things I   
see is a critical staff person leaves and that   
center is just lost for months and months, trying   
to figure out what is going on. So this is a plan   
that our board first approved the policy for and   
then we have spent a lot of time putting together   
a full written plan on how to do this, along with   
the forms for people to sign off and say, yes, I   
have ensured that somebody else knows this.   
So hopefully, at whatever point any person leaves,   
whether it's me or someone else, everything that   
we are doing should be able to be carried on on an   
ongoing basis.   
And then the next one is tracking finances.   
Again, so basic, in a way, I look at it and I say,   
why would you even say that? But I have worked   
with a number of individual executive directors,   
particularly, but sometimes program managers, who   
really don't understand their finances. And they   
are out there doing things and they have a good   
intent, but they don't realize, well, you can't   
spend money that way. It's not allowed. It's not   
in your budget. It hasn't been approved. What's   
going on?   
And just knowing that has to guide what you do.   
We can have the greatest ideas in the world, but   
if we mess up our funding, we are not going to be   
there to carry them out. It's just the reality of   
our situations.   
And with, that I put on there diversify funding.   
And to me, this is the most serious crisis that   
occurs in the financial issues. Again, in working   
with some other centers, the ones who have the   
most severe problems that I have seen are   
typically the ones that rely solely on government   
grants. And anything happens to disrupt that,   
whether it's the government is shutting down --   
and in California we do that on a regular basis,   
by the way. So whether it's government shutting   
down or a problem with billing that occurs or   
whatever, once that problem occurs, there's no way   
to deal with it because you can't, in most cases,   
pay for anything that's already happened in the   
past. You know, you have to use grant money for   
what you are doing right now.   
The only way to deal with that, and the only way,   
you know, any good business looks at it, is to   
diversify your funding and that can be   
fund-raisers. It can be grant writing. It can be   
fee for service, and we do a wide range of other   
things, trying to ensure that if one area has a   
problem, there's another area that at least can   
carry things for a while. But it also allows us   
to do a much broader area of things.   
The IL funding we all receive is very, very   
restrictive. And I have, again, worked with some   
others where some options came up of something   
good they could do, maybe it could even bring them   
in money down the road, but they had to have some   
up front money that was not restricted in order to   
get into it. And so by diversifying funding,   
particularly, with unrestricted funds, you put   
yourself in a whole different position. You now   
have opportunities, not only for what this new   
diversified funding is paying for, but you have   
opportunities if they come up for other options,   
you have money that can be used for that, which is   
critical.   
And then the last one, the last slide I have, is   
this be innovative and fearless in developing   
better ways to provide advocacy service, and   
funding and I have a little quote there. Running   
a business is like riding a bicycle. You either   
move forward or you fall down.   
So many times, I think particularly in difficult   
financial times, what we do is say, well, I have   
just got to hold on. Things are tight. And so   
what I have to do is kind of pull in and just hold   
on to what I'm doing. Rarely does that ever work.   
If you are not moving forward, if you are not   
coming up with ideas -- and you need to research   
them, but when you have made the decision, you've   
got to move forward.   
We do a number of different, I think, fairly   
creative things and we have had other Independent   
Living Centers at times say, wow, that's great.   
We would like to do it. We will do it. But then   
they just never make that jump and move forward.   
So if you are going to be innovative in your   
ideas, and your thinking, at some point, you've   
got to put it together and start moving on it, and   
full speed ahead kind of thing, and make sure that   
it's actually doing what that idea was, and being   
of course, evaluating it on an ongoing basis.   
But just continuing to do only what you have   
always done in the long term, you are not going to   
make it because the world changes around us, and   
we have to be able to change too.   
Okay. I think that was my input and it goes back   
to you, Lee.   
>> LEE SCHULZ: Yep. Bob, I would like you to let   
us know where your center is and how big it is.   
>> BOB HAND: Okay. Our base is in Fresno,   
California. We serve five counties in the middle   
of California. I have about 35 staff and then a   
number of volunteers and things.   
>> LEE SCHULZ: Great. Thank you.   
And I'm Lee Schulz, and our center is in   
Milwaukee, Wisconsin. We serve a four county   
area. I'm going to this slide on values base and   
this morning on the way to work, I was listening   
to the radio and they were talking about the most   
recognizable product in the world, and for years   
it had been Coke and Coke has dropped to number   
three, and Apple and Google have moved into first   
and second.   
And I think besides, you know, a product we use,   
the people who work there have a mentality that   
they are good companies. So one of the things I   
want to talk about is I think the -- as an   
Independent Living Center, we need to establish a   
really strong belief with the entire organization,   
our staff and our board and the whole belief of   
consumer control and direction.   
That's how we differ from all the other   
disability-related groups. You know, besides   
working with folks, zero to death, consumer   
control and direction is what makes us different.   
And when we are looking to hire staff, we really   
like to -- we call it fire in the belly, trying to   
find somebody that really believes in advocacy,   
and the right of people to live in the community.   
So we can go to the next slide and talk about --   
besides staff, we've got to talk about the board.   
To run an efficient center, you have to have a   
board that supports you and helps build the   
organization because as you know, the staff will   
change over time, and the board may change over   
time too, but they are the ones who control the   
mission and division for the agency.   
I believe you need to seek board members out who   
have skills that you may not have, as a director   
or a manager. So find people who can compliment   
your weaker skills.   
For example, if you have limited accounting skills   
you look for well-versed board members on your   
finance committee. And that's the case for me. I   
don't have an accounting background. I think some   
of the other directors across the country surely   
do. I don't have that. So I have really tried to   
build a strong finance committee, and looking   
for -- whether it's a rural community or an urban   
community, I think you can look at banks. You can   
look at investment officers, trust officers and   
you will have them in all communities and try and   
get them interested in your mission.   
And I will also say that in all the communities I   
have lived in, when I started looking at those   
individuals, I general found somebody who either   
has a disability or a disability is very prominent   
in their family. Larger banks, I'm sure if you   
search out, you will find somebody who is in   
manage. If not top or middle management that has   
a disability and they are good people to bring on   
your board.   
If you are new to the area, I think it's important   
you get board members who have a good base in the   
community, because they can bridge that gap for   
you. And they can especially bridge some of the   
political connections you might need.   
As an aside, and not everybody is going to agree   
with me, I have kind of made a rule that I won't   
have two lawyers on my board. When I have, it   
seems like they have never really done anything.   
So that's just a personal bias, I guess.   
We can go to the next slide, talk about critical   
factors. I think to develop a center, you really   
need to develop a reserve or an income stream,   
that's not controlled by contracts. This allows   
us to fill contract holes and it takes -- and you   
can take risks in developing new services or   
contracts. Years ago, we did a bingo fund-raiser,   
and over time, we were making about $25,000 a year   
and that became our resource to take risks as far   
as new contracts. And we didn't have to worry   
about going over a little bit, because we had some   
reserves.   
I think it's important to network with other   
nonprofits in your community, especially those   
that are disability-related, as it allows to you   
collaborate and increase your visibility and I   
think creates some worth for your agency in the   
community.   
I can't emphasize it enough. You need to do what   
you do well, and try and stay away from the things   
you don't. I think it's real easy to over extend   
an organization and then provide crummy support or   
services and that gets out in the community. So I   
think it's really important to concentrate on what   
you do well, and then market that.   
And by doing so, I think it creates a real   
positive reputation in the community and that   
oftentimes leads to additional opportunities.   
And with that, I think it goes back to Tim for   
questions.   
>> TIM FUCHS: That's right. Thanks, Lee. So we   
are on slide 24 here. And I'm going to open it up   
for questions. If you have questions on the   
telephone, press star pound. And if you are on   
the webinar, you can enter your question on the   
chat screen and the same for the captioning   
screen.   
Okay, I will start with our first question from   
Matt Peterson of Maine, while I wait for others.   
Matt asks if you have other revenue streams coming   
into your centers that are less traditional   
functions of CILs that you care to talk about. I   
will let you volunteer if you have one that you   
want to speak about.   
>> CHRISTY DUNAWAY: This is Christy. I'm not   
exactly sure what he's referring to about less   
traditional functions. Probably the most unique   
funding that we receive is for our Americorps   
program. It's a great way to give people with   
disabilities job training for starters, if you   
actively recruit and retain people with   
disabilities to serve as Americorps. It gives   
them on-the-job training skills and that funding   
comes from the national corporation for community   
service.   
So that's not your typical Center for Independent   
Living funding source.   
>> BILL HENNING: This is Bill. We are linking up   
with some health plans as managed care for people   
on -- people with disables on Medicare and   
Medicaid, is implemented in Massachusetts starting   
tomorrow and we're looking into this whole health   
reform arena to see if there are further   
opportunities. You know, it's something that   
really affects the population of people with   
disabilities and trying to get in on the ground   
floor, not just as a business venture, actually,   
that's secondary, but to also be in the design of   
programs is really important, and I think they go   
hand in hand. I think Bob kind of touched on, it   
take risks. Part of that too is just trying to   
get out there and create new initiatives and   
insert yourself in areas that are important to the   
community and that in itself is a development   
function ultimately too, I believe.   
>> LEE SCHULZ: This is Lee. Our center provides   
all four parts of AT Act and probably the most   
unique for our center is doing an alternative   
financing program.   
>> TIM FUCHS: Okay. Good. Thank you. Greg   
Kramer is wondering if you employ grant writers on   
staff.   
>> LEE SCHULZ: This is Lee. I do.   
>> TIM FUCHS: Anyone else besides Lee?   
>> BOB HAND: This is Bob. I don't have just a   
grant writer. I have one person who is halftime   
community development, and does grant writing, but   
the other thing I do is really encourage a number   
of the staff to work on it with me. So we have   
several different people looking and applying at   
different times.   
>> TIM FUCHS: Good.   
>> LEE SCHULZ: And I would like to add to that.   
Even though we have a grant writer, we do a lot of   
what Bob does. The staff who are doing the   
program, run across options. We have a youth   
program and because of her reputation, somebody at   
the foundation actually approached us to write a   
grant and so she'll do the primary part of it, but   
the grant writer cleans it up and adds all the   
basic stuff.   
>> BOB HAND: I think that's a scenario we have   
used in the past here as well, you know, getting   
back to something I was saying earlier on   
leadership, and this is Bill. Would knows the   
programs better than the line staff working with   
folks every single day? And they kind of can   
write things with a passion that comes out and I   
don't think you want to lose connection to that   
when you are putting documents out. So sometimes   
I think there's a myth about a grant writer who is   
going to bring this and that, and perhaps if it's   
at a hospital paying $300,000 a year to a   
development specialist, yes, but I'm not sure   
we're there yet. I'm pretty sure we are not there   
yet.   
>> TIM FUCHS: Good advice, thanks.   
>> BILL HENNING: I'm so sure we are no there.   
>> TIM FUCHS: Okay. We definitely have some   
interest on fund-raising. Sonjia is wondering,   
have you made use of fee for service opportunities   
to diversify your revenue streams?   
>> LEE SCHULZ: My budget is about $43 million and   
92% of that is Medicaid money, but it's from eight   
different contracts. So I feel like I have some   
diversity there.   
If you throw in other fee for service, we do for   
benefits counseling and things like, that close to   
96, 97% of my budget is fee for service.   
>> BOB HAND: Well, this is Bob and since Lee has   
all of that money, I might contract with him for   
some money. But we get fee for service out of job   
placement. We do sign language interpreting, the   
Medicare program moving people out of nursing homes is fee for service and then some other   
smaller types of things.   
>> BILL HENNING: Yes, this is Bill. Go ahead,   
Christy.   
>> CHRISTY DUNAWAY: Oh, I'm sorry, Bill. We have   
recently become a Medicaid provider within the   
past year and for transitioning people out of   
institutions and back into the community, so   
that's a fee for service and we do charge for some   
of our ADA-related things that we do, some of the training. We have a contract with the city to do   
training with city employees and we charge to go   
out and do site surveys and provide reports.   
>> BILL HENNING: Yep and we run an intendant   
program, and that's fee for service. I don't   
usually think of it that way, because we have such   
a stable consumer base and it's a very predictable   
revenue source, the numbers are, but, in fact, it   
is fee for service.   
>> LEE SCHULZ: And this is Lee. I will go back to   
an earlier question about unique funding because   
of our size of my accounting department and the HR   
staff and actually IT, we actually provide those services to other nonprofits and we will charge   
for that.   
>> BOB HAND: And to me, that's a very good point.   
This is Bob. And I have even encouraged other   
Independent Living Centers to do it. And some of   
us do some very specific things well. And instead   
of always going out and paying someone else, we   
can pay another Independent Living Center. We started a community leadership academy and we have   
three different grants to help fund that, besides   
other income on, it but it was originally just   
something we did for our own people here.   
>> TIM FUCHS: That's great. Really good variety   
of ideas.   
Okay. I don't see any questions on the phone.   
Let me remind everybody quickly to ask a question   
on the phone, you can press star pound to get into   
the question queue. I will give just a moment to   
see if anybody pops in.   
Okay well, as I mentioned -- oh, excuse me, we   
have one question that just showed up.   
All right, go ahead, caller.   
>> PARTICIPANT: Can you hear me?   
>> TIM FUCHS: Sure can.   
>> PARTICIPANT: Okay, our question was: Did Lee   
Schulz say his budget was $34 million or 3 to   
$4 million?   
>> LEE SCHULZ: 34.   
>> PARTICIPANT: 34?   
>> LEE SCHULZ: Yeah.   
>> PARTICIPANT: That's amazing! Good job!   
>> LEE SCHULZ: It's kind of scary, actually.   
>> PARTICIPANT: I would be -- yeah, very scared.   
Thank you. I just -- we were both sitting here   
going, no, no, he went 3 to 4. Okay. Thank you.   
That was it.   
>> TIM FUCHS: Okay. Thanks. We have another   
question in the queue. Go ahead, caller. Oh, it   
looks like they came out of the queue. All right.   
As I mentioned a few times. We have two more Q&A   
breaks coming up after this one. Just save it and   
we will get it in the next Q&A break. For now, I   
will go lead to next slide, and Lee will present   
the next question.   
>> LEE SCHULZ: Yeah, I will ask Bill Henning to   
identify strategies to elevate your current   
leadership abilities, including ways to improve   
listening skills when dealing with consumers,   
staff and the community. Go ahead, Bill.   
>> BILL HENNING: Sure. You know, I think it's not   
rocket science. Listening, some people will say   
it's an art. I think it's more a reminder to just   
do that task, to go out and, you know apportion   
the time in your schedule to listen to staff, to   
give a forum for it, to listen to managers, to sit   
back, listen to consumers, listen to board   
members. You really have to do it. And I think   
that's true at all managerial levels. You know,   
if you are running a center or you are in a   
management position or you are really working   
hard, you know, you might put in 50 hours a week   
on average, maybe more. You are working 48, 50   
weeks a year, you know this stuff. You know it   
better than a lot of people. You know it better   
than most people. But that doesn't mean you can't   
get better. That doesn't mean you can't listen   
and you really have to give time. And that makes   
you a better person in the work you do, but it   
allows for growth, new ideas to infiltrate into   
the organization.   
You know, when -- talking about staff, I think you   
can utilize trainings. I know myself, I forgotten   
that in the past and I have been appropriately   
scolded by staff. We haven't had any training.   
So we will dig down, put them out there annulet, I   
will -- I will offer it to people, and I always   
encourage that. It's a way to get out and learn   
something new, but it's also a way to get   
perspective to step out of the office. You know,   
on the slide it says "allow people to fill   
different roles and responsibilities in their   
job," you know, Bob was talking about staff   
learning other people's jobs. I also like to mix   
and match in certain ways. We will have a case   
conference for direct service staff, but I   
periodically will invite the systemic advocacy   
folks in to learn what the other folks are doing.   
And many of the direct service folks will go on   
events, rallies. I don't see anyone's job   
narrowly defined. Maybe the person doing clerical   
work, you would think so but I try to get   
everybody involved in all of what we do. And   
that's a way to create growth and I think Lee   
touched upon it in what he was saying. It creates   
your value system. We are all in this in a   
unified effort to promote independent living.   
And take risks helping people to emerge. You   
know, some people may want to emerge and you   
aren't sure if they have the skills but it's okay   
to take risks. Let them run a meeting. Let them   
lead an advocacy day at the state house. You may   
have to have a Plan B. If they speak and they   
don't say the right things, someone may have to   
intercede. What is the right thing?   
I'm talking about a big mistake. Sometimes the   
medium is more important than the message. We are   
there. We are saying we want our rights. We want   
independent living. That's about 80% of the   
message. A lot of the fine details may get worked   
out in other settings, but that's really important   
to let people fill different roles as doable, you   
know, we have a lot of requirements. There's a   
lot of things that have to be done, reports and   
whatnot, but you have to let people move of it and   
grow, see different perspectives. It just makes   
everybody, I think, a better employee an it builds   
your team.   
And sharing leadership is just so important. You   
know, it's easy to always take the lead role for a   
couple of people. They may be more articulate.   
They may know the issues best. They may be well   
known but it becomes a person centric   
organization, one or two people, if that's what   
happens. And I have known those organizations.   
They get defined by Joe's organization or, you   
know, Jane's or something like that. And I could   
mention real names, and those are weaker   
organizations, because if something happens to   
that one person, there's a problem. If   
something -- if that person isn't right on or   
making a mistake, then there's a whole lot of   
trouble. Sharing leadership is practical, but it   
also grows your leadership internally. You know,   
giving power to others builds organizational   
strength.   
I was trained years ago as a community organizer   
and one of the creedos in community organizing is   
that the more power you give away, the more power   
you get. And you are not doing that just to   
increase your own power or authority. It's to   
build an organization, to build a movement, you   
know, the independent living movement, to give   
strength to the organization. And the more than   
you can put people in different roles, the more, I   
think, they will flourish. And then acknowledge   
when they are successful. That's always a   
challenge. I get lots of feedback on that,   
internally. You know, you don't -- you know, and   
you weigh it. You weigh it on a scale. You know,   
you want to acknowledge success, but you don't   
want to be in a position where you have to give   
four gold stars on the forehead every time   
somebody shows up and just does what they are   
supposed to do. But you have to give really   
meaningful acknowledgment and there are many ways   
to do that, whether it's giving somebody an award,   
mentioning it in a staff meeting, telling their   
supervisor how good they are doing. Sometimes   
second -- letting somebody hear secondhand how   
important they are is a real good tactic because   
people like to be appreciated, and people like it   
when other people know that they are appreciated   
and that their work is being acknowledged.   
I think it's real important. Striking the balance   
is a key, but err on the side of giving positive   
feedback. Your staff, your board, your consumers,   
they are the soul of the organization. So treat   
everybody well, and bring them in on this work.   
Lee?   
>> LEE SCHULZ: Thank you, Bill. And I'm going to   
go to slide 28.   
And I can honestly day, of all the different kinds   
of workshops and trainings that I have gone to, I   
have never gone to a leadership workshop of any   
sort. So I'm not sure -- I think my comments are   
really kind of my comments. And I think I'm lucky   
that I have been doing this job for about 27   
years. We started very small, and over time we   
have gotten bigger. And one of the things I guess   
I have learned is that you need to get done what   
needs to be done. And when you can't do, it you   
really need to admit that whatever goal you were   
shooting for, you can't do it. And what were the   
obstacles to that?   
Because if you don't do that, you really condition   
learn from that experience. And sometimes by   
identifying the obstacles in the future, you can   
do a whole new program that will be successful.   
So I think it's kind of a stick-to-it-ness and if   
something can't be accomplished, identify why it   
can't be.   
I consider myself a reader. From day one here, I   
have always gotten subscriptions to almost every   
disability magazine. If I ever have time, I try   
to read the "Wall Street Journal." I think it's   
real important for us today to be reading about   
the Affordable Care Act, what's going on on a   
national level. You need to be reading about   
what's going on in your local community. I mean,   
what businesses are successful, which ones reason   
and maybe why they aren't, because they may be a   
resource for either a board member or a grant of   
some sort. You need to keep in touch with what's   
happening in your state. And I think you really   
need to read not just about disability, but about   
business and politics because it will affect you   
down the road sometime.   
You need to create a culture that allows for   
people to make mistakes. So they can take   
calculated risks. I mean, I have had people tell   
me that I'm a risk taker and I don't think so.   
Every time we have tried something that they think   
is risky, I have calculated that it's not. But   
that's something that people learn by trial and   
error. So you need to let them do that and as   
Bill was saying, either compliment them directly   
or you hear compliments from the community or your   
board, you make sure that goes right back to the   
staff.   
I think it's real important -- we'll go to slide   
29. We'll talk about listening. We have regular   
listening sessions with our consumers in   
community. I think that's really important when   
you are doing strategic planning and I would   
recommend you do routine strategic planning. You   
need to listen to your line staff about what's   
going on. Both what they are directly hearing   
from their customers, what they think of your   
service, what they think the community needs for   
service, but you also need to hear from them how   
they are experiencing their job, because if they   
get frustrated, you are not going to have a good   
reputation in the community. So you want to get feedback, directly what's needed in the community   
and feedback from your staff about how things are   
going.   
I think it's important for all centers to have   
consumers really involved in the advocacy   
committees. That's probably a given, but I   
thought I would mention it. We don't always think   
of this, but I think we need to listen to our   
vendors. So you know, you are working with other   
people in the community. It might be your county   
welfare department because you have a contract   
with them or it might be the paratransit service   
in your community or the regular transportation,   
but you do have vendors out there that you and   
your consumers interact with and I think it's   
really important to listen to them and see what   
they think is needed. And see if you can help   
with that.   
The center should be very knowledgeable about the   
American disabilities act, there are a whole lot   
of community organizations that could benefit from   
those kinds of services.   
With that, I will turn it back to Tim.   
>> TIM FUCHS: Great. Thanks, Lee. I'm going to   
go ahead to slide 30. And, again, you can press   
star pound to ask a question on the phone. Or you   
can type your question in the chat in the bottom   
right-hand side of the webinar platform.   
One more time, if you have a question, for Bill or   
Lee about the last section, you can press star   
pound or type your question in the chat.   
Okay. Well, good, we will have another Q&A break   
at the end. So for now, I will go to slide 31.   
and have Lee introduce our final discussion topic   
for today.   
>> LEE SCHULZ: Yeah, we will go back to Bob and   
Christy, and Bob, I believe, is first. He's going   
to describe the best practices for preparing staff   
members for increasingly higher levels of   
responsibility. Go ahead, Bob.   
>> BOB HAND: Okay, we are here on slide 32 for   
this, and, you know, this follows a lot what Bill   
and Lee were talking about earlier, because they   
were talking about including staff in a lot of   
different areas and this is just a little bit of   
maybe more detail on it. Just some ideas about   
how to go about it. But one of the things is you   
can set up a particular time to schedule it in.   
It could be part of a manager's meeting or   
separate one to review management issues with that   
midmanagement staff and you can even pick others.   
I mean, we know as we talked about here leadership   
and management, and often it's talked about as a   
point of leadership or natural leadership. But   
you are going to have staff who are natural   
leaders within your component or within your   
organization or within the community. And those   
are people you may want to be preparing for some   
management role.   
So you can do this just as talking about the   
issues that are being dealt with. Ones that maybe   
you are just dealing with at that time, but you   
want to make sure the others hear about it, and   
hear about what is happening with it. Or you can   
set up very specific training. Here's personnel   
laws and what you should know about them. Here's   
finances and how you read our financial   
statements.   
Even if it's no the something that they have to do   
right at that time, it may be something that they   
are going to move into and one of the things we   
know is none of us are going to be around here   
forever doing what we are doing and I think Bill   
made a very good point earlier about seeing   
organizations that are basically just one person   
operations, that one person knows everything and makes every decision. So if you are not preparing   
others to step up, no matter how well you are   
doing, later on, there's going to be problems.   
And another way I found that's good to do that, is   
to review actual issues that you addressed in the   
past, and as -- I can't remember who it was saying   
earlier about making mistakes. I too pretty much   
have a list of every single mistake that could be   
made and I have probably made it.   
But by giving those situations to the management   
staff you are teaching, you say, here is a   
situation. How would you have handled this?   
Whether you yourself handled it well or poorly at   
the time, you at least know the results of that.   
And I think that helps them step through actual   
situations that they are very likely to run into   
something similar to down the road.   
And then for the next slide, when staff approach   
you, and, again, I'm talking primarily about some   
sort of either program director, coordinator, or   
whatever, with questions -- and we have all heard   
this before in different ways, but it's certainly   
best if you can ask them to give solutions,   
because if what happens is everybody is executive   
directors always coming to you for answers, then   
they will never develop the answers themselves.   
So I try to use the approach -- don't probably do   
it all the time -- but try where I say if you are   
coming to me with a problem, what's the solution   
to it?   
And many, many, many times I found that people   
already know the solution. They are just not sure   
about it and it helps reinforce for them that they   
can deal with all of these issues.   
And then, you know, the more common things,   
provide staff with the materials and, of course,   
now so many of that is online, but I certainly, if   
I get notices, sometimes people will send me   
management articles and I try to send that on to   
other management staff or other staff would have   
that potential to take a look at it.   
And then meetings and this was brought up earlier   
about including them in any number of meetings,   
and one of the things that's happened here, we did   
some training, and it's part of that, we brought   
in other executive directors of centers here, and   
I always made a time to just have my -- some of my   
management staff just meet with them. Just talk   
to them about their experiences as executive   
director, because you are hearing from me, but   
they are going to have things -- ideas and   
experiences and things that I didn't have. So we   
just set aside time for that, totally different   
from whatever our training was, to give them an   
opportunity to learn from other people who have,   
obviously very good ideas about it.   
Okay. I think that ends mine.   
>> CHRISTY DUNAWAY: Okay. This is Christy. Can   
y'all hear me?   
>> TIM FUCHS: Yep. Go ahead.   
>> CHRISTY DUNAWAY: Okay. Great.   
Well, just to follow along with, that you know, in   
independent living, Centers for Independent   
Living, if you are following federal law, you are   
supposed to be consumer directed and consumer   
controlled. Meaning, of course, that most -- 51%   
or more of your staff and your board members   
should be individuals with disabilities. So we're   
focusing on the individuals' personal experience.   
I know here in Mississippi when we are hiring   
people, we are more concerned about their personal   
experience with a disability, how they have   
handled it, will they be able to provide peer   
support skills training information, and referral   
and advocacy. Those are, of course, the four core   
services and that's what we are here to do.   
So we are concentrating more on a personal   
experience than we are with hiring people who have   
a higher level of education.   
So sometimes it means that you are working with individuals whose educational level may be high   
school. It may be undergraduate degree, but not   
often a graduate degree. So that's great. It's   
good for the consumers. That's what you want, but   
when it comes time to develop a grant or write a   
grant, write a speech, write an article, whatever,   
sometimes that works against you, to some degree.   
So, you know, appropriate vocabulary is   
imperative, but we don't always get that if we   
don't have a little bit of a higher education.   
So to ensure that somebody is not left with all   
the responsibility of writing or representing the   
center, then other staff have to be expected to   
step up. We can go to the next slide.   
So I don't know about most you, but I personally   
plan to retire one day and hopefully not too   
distant of the future. So the directors, you,   
your board, your staff, everybody should be   
planning at some point for your ultimate   
retirement or your dismissal or your resignation.   
We experienced it here in Mississippi, in late   
2010/2011, when my husband became very ill and I   
simply was on a leave of absence for -- over the   
course of a 12-month period, I was on a leave of   
absence for about six of those 12 months. It was   
unexpected. It just happened. And fortunately,   
we had things in place to be somewhat prepared for   
it, but not totally.   
So it's imperative that you plan by developing   
your staff members to serve as leaders. You have   
to start planning ahead of time. Because they may   
have to step up sooner than you may have   
anticipated they would. We mentioned this before,   
take your staff members with you, if you are   
meeting with programmers for a specific program,   
take the program staff with them. Always look to   
fill vacant positions from within the organization   
whenever possible. And have a strategic plan in   
place for the future of the agency and have the   
staff provide total input.   
And I will be the first one to admit that we did   
not have a strategic plan in place for Life of   
Mississippi until three or four years ago, but   
it's made a huge difference in how we approach   
training staff, and ensuring that we've got the   
knowledge and the expertise always within the   
office to handle, it and we have done all of that,   
as a result of the strategic plan, because we have   
something to follow.   
So expect your staff to perform. It shows that   
you are confident in their abilities, however,   
keep in mind that they may not always be   
comfortable. So you've got a fine line there.   
You want them to be confident. You want to expect   
them to perform certain tasks. You want to create   
an atmosphere where they can shine whenever   
possible but they have to be comfortable in   
telling you when they can't do it. You don't want   
to put somebody in the spotlight, would is not --   
who is not totally prepared and is not comfortable   
with it. It doesn't help their confidence any and   
it certainly doesn't make the center look as good   
as it can.   
So it's a fine line, but you need to create an   
atmosphere where, you know, you actually expect   
them to step up, take the responsibility that you   
need them to take, but at the same time, you need   
to make sure that they are well trained and that   
they are comfortable with doing it.   
Search for other opportunities, for instance, as I   
mentioned earlier, we have an assistant director   
with the organization. She does not have a lot of   
public speaking experience. I have a program   
manager with the same situation. She's good at   
what she does. She's good at teaching the health   
and wellness program but she doesn't have a whole   
lot of public speaking experience.   
So what we did was we researched -- there's plenty   
of colleges and universities in the state of   
Mississippi, and they offer adult education   
programs and so we found one locally that is   
offering a public speaking class this fall. It's   
like one night a week for seven weeks, and it's a   
minimal amount of money. It's $600 for two people   
to go. Very well worth it. I'm just suggesting   
that you search for those adult education   
opportunities. Step outside your box a little   
bit. Go to your center, your state center fornonprofits. They often have really good training   
programs that you can do. Join that state center   
for nonprofit if you've got one. Join the chamber   
of commerce, if you are not already a part of it.   
Your chambers of commerce often offer really good   
training programs.   
And you can get good training on grant writing   
board development, finding funding in tough   
economic times, et cetera, et cetera. So think   
outside the box a little bit when it comes to   
preparing your staff for stepping up.   
So that's what I have and so I will turn it back   
over to Tim for questions.   
>> TIM FUCHS: Great. Thank you, Christy.   
>> CHRISTY DUNAWAY: Sure.   
>> TIM FUCHS: Okay. So here we are at the final   
Q&A session. If you have a question, from any   
part of the presentation today, please don't be   
shy. I see some rolling in on the web already. I   
just want to remind everybody before we take it,   
that you can press star pound to ask a question.   
I will check in every so often on the phones to   
see if anything comes in. For now, let me start   
with these web questions.   
Okay. Our first question comes from Marybeth   
Luby. She asks how have you been able to overcome   
the lack of formal education barrier, with   
potential funders. Since you mentioned it, I will   
turn that question over you to first, Christy.   
>> CHRISTY DUNAWAY: Well, I don't know that I   
necessarily address it. You know, when I'm   
talking to potential funders or if I'm developing   
a grant application, I'm always the point of   
contact within the grant. Often I don't know yet   
what staff member, perhaps, is going to be the   
program manager or if I'm going to need to hire   
somebody.   
So it hasn't -- it's never really been an issue   
with us as far as -- in terms of, you know, the   
formal education. I will say that as it turns   
out, the majority of my program coordinators,   
these people who are responsible for a particular   
program do at least have a full college education.   
It's just worked out that way. It's not something   
that we necessarily were looking at doing.   
So I don't know, Marybeth, I don't know that I   
have actually overcome it as much as I've just not   
had to deal with it yet.   
>> TIM FUCHS: Okay. Thanks, Christy.   
Let's see, Greg Kramer asks if some of you could   
share your process or contents for employee   
evaluations. So how do you handle employee   
evaluations for those people that you all   
supervise? Or how do you handle it from a   
leadership perspective for employee evaluations   
throughout the organization?   
>> CHRISTY DUNAWAY: This is Christy, Augusta who   
is our assistant director, she does the employee   
evaluations and then, of course, brings them to me   
for review, and if there's issues or anything that   
needs to be discussed, we will call in the other   
staff person, but she handles all of that.   
And then the board -- I do her's and then the   
board does mine.   
>> BOB HAND: This is Bob. In our case, each   
program director does theirs but, again, I review   
them, and then I do them and the board does ours.   
Our evaluation forms come primarily right off the   
job description. And then, of course, you add   
some things like attendance and stuff, but,   
mostly, it should be tied, I feel to what the job   
description says they are going to do.   
>> TIM FUCHS: And do you all include goals for   
leadership development among all staff as well?   
So do you include things that they would like to   
work on or they would like to work towards in   
their jobs?   
>> LEE SCHULZ: This is Lee. We do ours pretty   
much like Bob does and part of things that the   
managers do is when they are doing the evaluation   
with staff, is they look to the next year as far   
as what they would like to learn. We do have   
tuition reimbursement. So it can be a formal   
education or it can be workshops. Or it might be   
cross training with another employee.   
>> TIM FUCHS: Great. Thanks.   
>> CHRISTY DUNAWAY: This is Christy. We do the   
same thing. I mean, if there's a problem, we look   
to see what goals they need to reach, and how we   
are going to help them reach those goals in the   
following year.   
>> BILL HENNING: And this is Bill. One thing I   
would encourage, just regular discussions, I think   
that's been brought up during the afternoon, and I   
think that's important. These are issues that   
shouldn't -- there may be concerns. There may be   
good things happening that should be discussed   
more than once every 12 months or wherever you do   
the evaluation.   
>> TIM FUCHS: Yeah, thanks. Okay.   
Next question, I don't know that we are going to   
have an answer for, but maybe we could come up   
with some creative advice. Gale Dean, have you   
been able to overcome staff that can't work full   
time because they are worried about giving up   
their benefits such as Social Security or   
Medicaid?   
>> CHRISTY DUNAWAY: This is Christy and honestly,   
I can't answer it. I have the exact same problem.   
I don't know if every Center for Independent   
Living is facing this same situation. It's so   
frustrating. The only thing I have been able to   
do if I absolutely have got to have somebody full   
time for a position and that's just the way it's   
advertised, you know? It's one of things I make   
clear in an interview with people who come in,   
would have disabilities, is that this is a   
full-time position. It does have benefits, you   
know, with, it but it's full time, and that's what   
I have got to. Have there's no room for   
negotiation to lowering the salary. I have had   
staff in the past who have come to me and said,   
you know, just cut my salary. I will keep on   
giving you the same amount of time. Well, if you   
continue to do that, if something happens to that   
person and they have to leave, then how do you go   
about hiring somebody for that minimal cost?   
So anyway, I say all of that to say, I don't   
really have an answer because I have the exact   
same problem. Maybe -- maybe Lee or Bill or Bob   
have some advice for us.   
>> LEE SCHULZ: This is Lee and I would say whoever   
made this call, call me sometime not on a national   
teleconference.   
But some of the things we have done, job sharing   
is one. Occasionally we can come up with some   
benefits other than salary that are good for the   
person.   
>> BILL HENNING: This is Bill. I think you --   
what I have learned and I said this at some point,   
you know, I made a lot of mistakes. I think Bob seconded that when he was speaking, but you've got   
to be very clear if you are hiring somebody part   
time, that it is a part-time job and that you have   
real boundaries around it. That's -- I think you   
get in real trouble when they try -- somebody   
tries to work more hours and it's all kind of   
ad-lib, you know. There's uncertainty around it.   
If it's part-time, it has to be Ave defined role,   
not more fuss at all -- it has to be a very   
defined role, and not amorphous at all.   
>> TIM FUCHS: A similar question from Greg Kramer,   
who asks about working with staff that are unable   
to work all of their hours that can't work their   
hours due to medical conditions beyond their sick   
leave. Anybody have any advice there?   
>> BILL HENNING: I think it's a real --   
>> LEE SCHULZ: Go ahead.   
>> BILL HENNING: I will just say, these are real   
good questions because I think it's something thcomes up in numerous centers and how you tackle it   
may be unique to each center but the more you can   
define, it the better. I think it gets very   
challenging because you are trying to run a   
business, but you are also trying to set an   
example for your community of providing   
accommodations and you are also a human service   
provider in some sense. So you try to be empathic   
to people. There's lots of challenges. I think   
clarity in boundaries is the best way to handle   
it.   
I haven't always done it, but that's probably of   
the best way to go.   
>> CHRISTY DUNAWAY: This is Christy. I would just   
suggest, Title I of the Americans with   
Disabilities Act applies to us as it does to the   
rest of the world. So, you know, the bottom line   
is and I've had this situation before, and as   
frustrating and as sad as it may be, if you need a   
job done and that individual due to illness is not   
capable of performing the essential functions of   
that job, you know, sometimes you just have to --   
you are a business. You have a business to   
operate. We are different from the vast majority   
of businesses out, there but you do have to keep   
in mind that you are a business and you are trying   
to serve consumers in the community. That's   
difficult to do sometimes if an employee has been   
very sick.   
Now, we do -- we can share our leave time. So if   
we have an employee who has used up all of their   
sick leave, because of surgery or whatever, and   
they have a pretty defined date of when they might   
be able to return to work, our staff can share   
their sick leave with other staff. So that does   
help.   
>> LEE SCHULZ: This is Lee. And I would say, we   
function very much like Bill and Christy and this   
is probably the hardest part of management, is   
dealing with that issue.   
But the bottom line comes down to, we're here for   
the community consumers and we get paid to do   
that, and at some point, we have to let people go   
because they can no longer handle it.   
>> BILL HENNING: And I said be clear and set   
boundaries. That said, these things never go   
smoothly.   
>> CHRISTY DUNAWAY: Right.   
>> BILL HENNING: Or seldom do. Let's put it that   
way.   
>> CHRISTY DUNAWAY: Right.   
>> BILL HENNING: Because someone condition predict   
their health. Eventually it becomes predictable   
and that's when you have to be very firm.   
>> TIM FUCHS: Thanks. Tough personnel issues.   
Thank you so much. Unfortunately we are here at   
4:30. So I will have to close the call. I want   
to thank all of you for being on the phone with us   
today. I really appreciated your questions and   
being with us. Don't forget, whether it's for you   
or for a colleague, that the archived version of   
this webinar will be available within 48 hours and   
that includes the PowerPoint, as you saw, it the   
audio, the captioning, everything. If you want to   
share this with, say, some of your staff or board   
members, please feel free.   
And especially, I want to thank all of our   
presenters today. In fact, I will click to slide   
39 here which includes their contact information   
that they have been generous enough to offer,   
Christy, Bob, Bill, and Lee. An excellent   
presentation. I really appreciate the thought and   
leg work that you have put into developing your   
answers to these discussion questions and for working with us over the last couple of months.   
Really, really great. So thanks so much.   
And finally, before we close, I'm going to click   
to slide 40, and that's the evaluation I   
mentioned. For those of you on the webinar, this   
is a live link. You can click on that and it will   
take you to the evaluation form. Again, if you   
are participating in a group, we would love to   
have your individual opinion on this. If you are   
listening just on the phone today, you can access   
this evaluation link in the confirmation email   
that was sent to you. Please fill it out. It's   
important to us.   
With, that I want to thank everybody: Have a wonderful afternoon. Bye-bye.   
(end of session)  
Event is not active