**DB Summit July 20, 2014**

**Passing the Baton Concurrent Session**

**Maurice Belote and Lisa Poff**

**Session participants 15 – 20 ( I didn’t count…that is a guess)**

**Some Leading Questions Were Introduced**

Maurice introduced the session with a couple of questions:

How do you know when it is time to go?

How do you know when to let go and exit gracefully?

Lisa shared some of her experiences in the transition in Indiana with Karen Goehls’ retirement:

* Value of relinquishing early – letting people know that current decisions about the future are up to them
* Helps to foster decision making skills and investment in project ownership

**Logistical Issues**

What if the person who you want to follow you is not on the project?

There are a variety of things that projects have done in order to help develop people that they might want to recruit:

* Mentor them thru a variety of activities
* Project has delivered training and TA – they have been the recipient
* Invitations to co present
* Bringing in as guest presenters or lecturers

Important to identify project needs when considering the transition – db expertise or general skills geared towards TA.

What is the mechanism for passing the db content to new project staff who come on with no expertise in db

All competing for small pool of talent

Meaningful planning includes figuring out where project will go. Smaller more rural states may not replace people from SDOE’s when they vacate a position. In smaller states in SDOE’s there may be no one available who has specialized background.

SDOEs and Universities may not want grants any longer when key personnel retire

Funding to allow for overlap of staff

In order for mentoring to be possible there needs to be cross over/overlap and funding is at minimal levels making that impossible.

**Suggestions to Consider**

Work with HR department to accommodate the various needs that will come up in trying to bring new people on.

Multi state grants may be mechanism to consolidate grants and expertise if some states choose not to replace retiring staff within a dept.

Having systems and infrastructure (policy) can be very valuable for transferring. WV has spent a lot of time at the state level building in policy to insure services whether there is skilled staff within the project or in the event that there is no project.

Consider when to transition. Many are choosing to transition after the new cycle has begun, building in some time to get the new project started. Some of these people have taken reduced FTE.

Need to make sure that new people on the project can write grants and write reports

**How Can We Partner**

Recruit Helen Keller Fellows – Do outreach via email letter reminding them of their efforts in TA when they were in the program and letting them know that there are many opportunities occurring across the network.

Recruit from NLCSD and NCLVI – the PHD consortium for leadership.

Create opportunities that are content focused to bring newcomers in and provide opportunities to learn. In old days there was a national conference, topical conference, summer institutes, etc., that provided opportunity. The network is a resource – how can we improve mentoring of new people. Consider a network approach

Devise mechanisms for continuing this conversation and come up with very specific ideas about how to use the network in recruiting and mentoring new people and to provide some of that content information that is a source of concern.

Intensive TA from Linda McDowell on how to get seed $$ to develop staff

Use models of professional development and competencies to address the expectations that personnel are trained.

Have to teach people in this field how to keep options open. That there are opportunities

How do these children get services if we all are gone? What have we done to insure a system is in place for dbfunding for the long term?