

Methods of Internal Planning

Marcy Crane
Melissa Swartz

Annual Work Plan Template

PLAN NAME				
	Step Q1	Step Q2	Step Q3	Step Q4
RESPONSIBLE	This is a sample text. Insert your desired text here.	This is a sample text. Insert your desired text here.	This is a sample text. Insert your desired text here.	This is a sample text. Insert your desired text here.
PROGRESS	This is a sample text. Insert your desired text here.	This is a sample text. Insert your desired text here.	This is a sample text. Insert your desired text here.	This is a sample text. Insert your desired text here.
GOAL	This is a sample text. Insert your desired text here.	This is a sample text. Insert your desired text here.	This is a sample text. Insert your desired text here.	This is a sample text. Insert your desired text here.
	1-3 Period	4-6 Period	7-9 Period	10-12 Period

Providing Tips to Operationalize Your Annual Work Plan


July 22, 2024

Marcella Crane

Contracts Manager



Why did Arizona create an operationalized annual work plan?

- New Director hired in spring 2022.
 - Staff did not have a handle on projects and expected timelines & deadlines.
 - AZ annual work plan consists of 5 Goals, with 14 objectives and 43 activities.
 - There are approx. 10-15 grant funded projects.
- 
- A large yellow triangle is positioned in the bottom right corner of the slide, pointing towards the top right.

Who develops Arizona's annual work plan?

- Council Members annually approve the work plan that is submitted to ACL.
- Staff meets quarterly to review the AWP and update all activities.
- Also, during the year, the AWP (Council) committee meets quarterly with staff to review the current plan.
 - Staff briefs them on all projects and if necessary, solicits input on new activities.
 - These meetings provide a chance to review all the work the Council has approved and to review timelines of key funded projects.
 - Allows for Council members to engage with staff and incorporate their feedback.

AZ example of AWP; FFY 2025 draft

ADDPC 2025 Annual Work Plan – To be Updated & Submitted to ACL

October 1, 2024 – September 30, 2025 (DRAFT)

Goal #5 SYSTEM ACCESS & NAVIGATION: By FFY 2026, the ADDPC will enhance, strengthen, and increase access to accurate and user-friendly information and the services needed for people with intellectual and developmental disabilities (I/DD) to lead more self-determined lives.

Objective 1: Annually, the Council will champion and support at least one initiative to ensure individuals with I/DD and their families have access to pertinent information that assists them in navigating transition points (including ages 18 - 22, and 50 through end of life).

Number	Work Plan Activity Output Statements	Budget Evaluation type	Staff or Grant / Other Notes Grantee Name/Contract Period Outcome Statement	Update on Progress: Provide a summary of the project activity and next steps.
1	Develop and expand access to timely information on navigating and utilizing the DD service system through conferences, webinars, town halls, and/or partnerships at least four times per year.	No funding	Staff lead: Jon, Sarah, Jason-	
PMs: SC 1.5=1	Output Statement: The Council will participate in 4 community events focused on un/underserved communities.	Evaluation: Tracking sheet for # of attendee's; signup sheets, Satisfaction survey	Outcome Statement: Persons with I/DD from un/underserved communities will have increased access to timely information.	
2	Develop an implementation plan for continuing the distribution and evaluation of, and providing updates to, the "How-To Guide". A resource for navigating Arizona's service system for families and persons with I/DD moving to AZ from out of state.	No funding	Staff Lead: Jon, Sarah	
PMs: SC 1.5=1	Output Statement: The Council will develop and finalize an online guide to make it electronically available.	Evaluation: Meeting minutes; tracking website usage	Outcome Statement: Persons with I/DD and families will have greater access to information related to services and supports based on different transition stages.	

AZ example of AWP; FFY 2025 draft (part 2)

3	Distribute & partner with groups to share resources, services, and supports for the 50+ and elder populations with I/DD (through the How to Guide / Online)	No funding	Staff Lead: Jon, Sarah	Part of this work is funded by NACDD Bridging the Gap initiative
PMs: SC 1.5=1	Output Statement: The Council will develop and finalize an online guide to make it publicly available	Evaluation: Meeting minutes; tracking website usage	Outcome Statement: The 50+ and elder populations with I/DD will have greater access to information related to services and support based on different transition stages.	
4	Implement policy recommendation(s) from the research on elder care (based on RCBH research report). Partner with state systems and nongovernmental organizations that provide information and supports to the 50+ and elder populations with I/DD. <ul style="list-style-type: none"> In FFY 24 – Review final report with Committee and approve recommendations to implement in FFY 25. 	No funding	Staff Lead: Jon	New activity; combine with Activity #3; discuss further with Council/Committee
PMs: SC 1.5=1	Output Statement: The Council will analyze the results of the public health workforce report (Covid \$\$) and develop policy recommendations (note: will address in Spring 2024)	Evaluation: Meeting minutes	Outcome Statement: Services supporting 50+ and elder populations with I/DD and caregivers will be improved.	

How are timelines created?

- Begin the process of developing an operationalized work plan at the beginning of the federal fiscal year.
- Consider having key staff to discuss project timelines, including your fiscal staff.
- Know when federal funds need to be obligated and liquidated. This will determine and affect how long projects can be funded.
- Consider having a Council work committee that is informed and involved in reviewing and developing new ideas.

What are other considerations needed?

- Keep the AWP in a shared folder for access to staff
- Keep old versions saved, don't delete or type over versions.
- Consider one or two staff to update the AWP.
- During staff review, allow for everyone to provide input, ask questions on the status of each project, & have hard but effective communication for proper planning.

Final key points to consider



When you operationalize your AWP, Councils and staff will have better mechanisms:



To be Accountable. Staff is accountable to each other for meeting timelines for completion of projects; and the Council provides timely feedback.



To show Appropriate Timing of key functions. Such as when competitive bids need to be released; when projects need to wrap up.



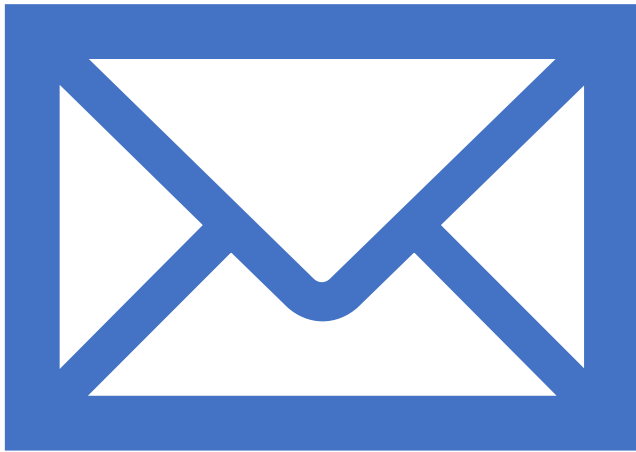
To Determine Capacity of your resources (staff, sub-grantees, award monies).



To Develop the next federal AWP. Your existing plan, if updated and used throughout the year to track progress, can be your template for the next one.



To Reflect on current work that is and isn't being completed. It's okay to say we're doing a lot, and we don't have the resources; or we need to ask the Council to postpone a project for the next year. Have good communication.



Contact information

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NCCDD
North Carolina Council on
Developmental Disabilities

Annual Work Planning and Monitoring Activities

July 22, 2024

Melissa Swartz, Ph.D.

Systems Change Manager



NCCDD
North Carolina Council on
Developmental Disabilities

Content Guides

5 Year State Plan

- Goals and Objectives
- Logic Model

Annual Work Plans

Monitoring Practices/Activities

Council Engagement

- Quarterly Council Meetings
- Monthly Executive Committee Meetings
- Between Meeting Member ↔ Staff Interaction

Staff Monitoring

- Weekly Staff Meetings w/ Fiscal and Program Updates
- On-Going, as needed Contractor (Grantee) Monitoring
- Between Meeting Interaction Member(s) ↔ Staff

Example Materials

Weekly Fiscal/Budget Report

NC COUNCIL ON DEVELOPMENTAL DISABILITIES CURRENT INITIATIVE BUDGET/EXPENSE REPORT BY COMMITTEE MAY 2024										
GRANTEE NAME	INITIATIVE NAME	INITIATIVE YEAR	FFY	NCCDD STAFF	GRANT AWARD	INITIATIVE EXPENDED	INITIATIVE BALANCE	LAST RFR	TARGET %*	% SPENT
FINANCIAL ASSET DEVELOPMENT										
GRANTEE NAME	INITIATIVE NAME	1 OF 3	2023		\$ 80,000.00	\$ 44,538.93	\$ 35,461.07	31-Mar-24	52%	56%
COMMUNITY LIVING										
GRANTEE NAME	INITIATIVE NAME	9 MONTHS	2023/2024		\$ 25,000.00	\$ 3,393.29	\$ 21,606.71	31-Mar-24	33%	14%
GRANTEE NAME	INITIATIVE NAME	9 MONTHS	2023		\$ 14,000.00	\$ 2,400.00	\$ 11,600.00	31-Mar-24	33%	17%
GRANTEE NAME	INITIATIVE NAME	9 MONTHS	2023		\$ 15,000.00	\$ 4,263.04	\$ 10,736.96	31-Mar-24	33%	28%
GRANTEE NAME	INITIATIVE NAME	9 MONTHS	2023		\$ 25,000.00	\$ 14,250.00	\$ 10,750.00	31-Mar-24	33%	57%
GRANTEE NAME	INITIATIVE NAME	9 MONTHS	2023		\$ 6,500.00	\$ 1,800.00	\$ 4,700.00	31-Mar-24	33%	28%
GRANTEE NAME	INITIATIVE NAME	10 MONTHS	2023		\$ 19,972.00	\$ 3,018.87	\$ 16,953.13	31-Mar-24	33%	15%
GRANTEE NAME	INITIATIVE NAME	9 MONTHS	2023		\$ 19,528.00	\$ 4,806.48	\$ 14,721.52	31-Mar-24	33%	25%
GRANTEE NAME	INITIATIVE NAME	9 MONTHS	2023		\$ 25,000.00	\$ 12,662.00	\$ 12,338.00	31-Mar-24	33%	51%
GRANTEE NAME	INITIATIVE NAME	6 MONTHS	2023		\$ 25,000.00	\$ -	\$ 25,000.00	31-Mar-24	0%	0%
GRANTEE NAME	INITIATIVE NAME	4.5 MONTHS	2024		\$ 20,000.00		\$ 20,000.00	31-Mar-24	0%	0%
ADVOCACY DEVELOPMENT										
GRANTEE NAME	INITIATIVE NAME	1 OF 3	2023		\$ 90,000.00	\$ 47,256.63	\$ 42,743.37	31-Mar-24	42%	53%
GRANTEE NAME	INITIATIVE NAME		2023		\$ 55,000.00	\$ 17,966.67	\$ 37,033.33	31-Mar-24	33%	33%
GRANTEE NAME	INITIATIVE NAME	1 OF 1	2023/2024		\$ 110,000.00	\$ -	\$ 110,000.00	0-Jan-00	0%	0%
CROSS CUTTING										
GRANTEE NAME	INITIATIVE NAME	9/ON-GOING	2023		\$ 24,000.00	\$ 10,082.78	\$ 13,917.22	N/A	67%	42%
GRANTEE NAME	INITIATIVE NAME	17/ON-GOING	2023		\$ 30,000.00	\$ 18,518.52	\$ 11,481.48	N/A	67%	62%
GRANTEE NAME	INITIATIVE NAME	24/ON-GOING	2023		\$ 30,000.00	\$ 16,282.62	\$ 13,717.38	N/A	67%	54%
GRANTEE NAME	INITIATIVE NAME	ON-GOING	2023		\$ 619,398.00	\$ 449,833.06	\$ 169,564.94	N/A	67%	73%
GRANTEE NAME	INITIATIVE NAME	11/ON-GOING	2023		\$ 38,500.00	\$ 27,910.00	\$ 10,590.00	N/A	67%	72%
GRANTEE NAME	INITIATIVE NAME		2023		\$ 10,000.00	\$ -	\$ 10,000.00	N/A	0%	0%
GRANTEE NAME	INITIATIVE NAME		2023		\$ 10,000.00	\$ -	\$ 10,000.00	N/A	0%	0%
GRANTEE NAME	INITIATIVE NAME	1/ON-GOING	2023		\$ 5,000.00	\$ -	\$ 5,000.00	N/A	67%	0%
GRANTEE NAME	INITIATIVE NAME	3 OF 4	2023		\$ 150,000.00	\$ 77,522.95	\$ 72,477.05	31-Mar-24	42%	52%
GRANTEE NAME	INITIATIVE NAME	5 OF 5	2022/2023		\$ 265,000.00	\$ 216,464.44	\$ 48,535.56	31-Mar-24	90%	82%

Council Engagement Activities

Reporting at Quarterly Council Meetings

- Full Council Pre-Committee Mtg.
- Base Committee Mtgs. (3)
 - Initiative Presentations by Contractor &/or Staff
- Fri. Business meeting
 - Base Committees Report out
 - Directors Report

Quarterly Council Meeting Booklet

- State Plan ID Section
- Committee Information Sections

Example Materials

Quarterly Council Meeting Agenda

Day1

Day 2



Meeting: NC Council on Developmental Disabilities
Location: Doubletree Charlotte, NC/ ZoomGov

FINAL AGENDA
THURSDAY, MAY 2, 2024

Join ZoomGov Meeting: <https://www.zoomgov.com/j/1610918623?pwd=00iNVFLc3RXVihlYXdScW9paGVZz09>
 *Breakfast (Provided) 7:45-9:00 AM
 In-Person - Ballroom

8:30 – 8:45 AM **WELCOME & APPRECIATION OF OUTGOING MEMBERS**

8:45 – 9:45 AM **INITIATIVE UPDATES & FUNDING DISCUSSIONS/REQUESTS**
 ~Financial Asset Development Initiative/Investment Opportunities
Financial Asset Development Committee
 ~Community Living Initiative/Investment Opportunities
Community Living Committee
 ~Advocacy Development Initiative/Investment Opportunities
 ~Bridging Pathways I/DD Peer Mentoring Initiative Update
Advocacy Development Committee
 ~Council Budget: SFY 2024-2025
 ~In-House Initiatives: SFY 2024-2025

9:45 – 10:15 AM **BREAK**

10:15 – 11:15 AM **PUBLIC POLICY EDUCATION UPDATE**.....

11:15 – 11:30 AM **DMH/DD/SUS Update**.....

11:30 – 12:00 PM **LUNCH SERVICE BEGINS** *Lunch (Provided) 11:30-1:00 PM

12:00 – 1:00 PM **LUNCH SESSION – ALTERNATE RESPONSE/PEER SUPPORT**.....

1:00 – 1:30 PM **BREAK**

1:30 – 3:45 PM **COMMITTEE MEETINGS**
 Advocacy Development.....Salon A
 Community Living.....Salon B
 Financial Asset Development.....Salon C

3:45 – 6:30 PM **DINNER ON YOUR OWN**

6:30 – 8:00 PM **I/DD TOWN HALL**...

In-Person Registration: <https://lp.constantcontactpages.com/ev/req/k6jxd65>
Virtual Registration: <https://lp.constantcontactpages.com/ev/req/jz2vaz2>



Meeting: NC Council on Developmental Disabilities
Location: Doubletree Charlotte, NC/ ZoomGov

FINAL AGENDA
FRIDAY, MAY 3, 2024

Join ZoomGov Meeting: <https://www.zoomgov.com/j/1616316772?pwd=NjNlZWtZmtudENMdnJTVkVWTVZzdz09>
 *Breakfast (Provided) 7:30 – 8:30 AM
 In-Person - Ballroom

8:30 – 8:45 AM **WELCOME, CONFLICT OF INTEREST & SAFETY AND PREPAREDNESS**.....

8:45 – 8:55 AM **ROLL CALL**.....

8:55 – 9:00 AM **APPROVAL OF MINUTES**.....

9:00 – 9:25 AM **DIRECTOR'S REPORT & APPRECIATION**.....

9:25– 9:30 AM **FINANCIAL REPORT**.....

9:30 – 10:00 AM **LEGISLATIVE UPDATE**.....Representatives Brown and Hawkins/Senator Batch

10:00 – 10:15AM **PUBLIC COMMENT***.....

10:15 – 10:45 AM **BREAK**

10:45 – 11:45 AM **COMMITTEE REPORTS**
 Executive Committee.....
 Advocacy Development.....
 Community Living.....
 Financial Asset Development.....
 Public Policy Education Committee.....

11:45 – 12:30 PM **IDD NETWORK PARTNERS & STATE AGENCY UPDATES**

12:30 – 12:40 PM **NEW BUSINESS**
 ~NCCDD Elections: Vice-Chair.....

12:40 – 12:45 PM **OLD BUSINESS**

1:00 PM **ADJOURN**



NCCDD
 North Carolina Council on
 Developmental Disabilities

Example Materials

NCCDD Five-Year State Plan Identifications

NCCDD Five-Year State Plan Identifications of
Council Meeting Activities
May 2-3, 2024

COMMITTEE	STATE PLAN ID	DESCRIPTION
FULL COUNCIL MEETING-MEMBER DEVELOPMENT		
	All Goals	Welcome & Appreciation of Outgoing Members
FULL COUNCIL MEETING-INITIATIVE UPDATES & FUNDING DISCUSSIONS/REQUESTS		
FAD	1A/B/C	Financial Asset Development Initiatives / Investment Opportunities
CL	2A/B/C/D/E	Comm. Living Development Initiatives / Investment Opportunities
AD	3A/B/C	Advocacy Development Initiatives / Investment Opportunities
AD	3A	Bridging Pathways I/DD Peer Mentoring Initiative Update
	All Goals	Council Budget: SFY 2024-2025
	All Goals	In-House Initiatives: SFY 2024-2025
FULL COUNCIL MEETING-MEMBER DEVELOPMENT		
	All Goals	Public Policy Education Update
	All Goals	DMH/DD/SUS Update
	All Goals	Lunch Session – Alternate Response/Peer Support
COMMITTEE MEETING-ADVOCACY DEVELOPMENT		
AD	3B	Ability Leadership Project – NC (CBCG)
AD	3A	Peer Mentor Training Update
AD	3A	NC Advocacy Leaders Network
AD	3A	Self-Advocate Discussion Series
AD	3B	Hispanic Disability Advocate
AD	3A/B/C	Fiscal Report
COMMITTEE MEETING-COMMUNITY LIVING		
CL	2A-E	Fiscal Report
CL	2B	After the Law: Guiding the I/DD Community to Supported Decis...
CL	2A-E	Community Living Mini-Grants: Best Buddies Intern...
CL	2B	Meet the Need NC
CL	2A-E	Future Investment Discussion

NCCDD Five-Year State Plan Identifications of
Council Meeting Activities
May 2-3, 2024

COMMITTEE MEETING-FINANCIAL ASSET DEVELOPMENT		
FAD	1B/C	Benefits Counseling Expansion Project - Update
FAD	1A/B	HBCU IPSE Pre-Planning Initiative – Update
FAD	1A/B/C	Financial Update
FAD	1A/B/C	State and National Initiatives - Updates
FAD	1A/B/C	Discussion on Potential Investment Ideas
FULL COUNCIL MEETING-MEMBER DEVELOPMENT		
	All Goals	I/DD Town Hall
FULL COUNCIL MEETING-NEW BUSINESS		
	All Goals	Directors Report
	All Goals	NC DHHS Update
	All Goals	Financial Report
	All Goals	Legislative Update
	All Goals	Public Comment
	All Goals	Committee Reports
	All Goals	IDN Network Partners & State Agency Updates
	All Goals	New Business

Contact Information

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<http://www.nccdd.org>

