

DD Council 5-Year Plan TA Brief

Planning Timeline and Tasks



How long does it take?

A timeline of approximately 12 to 18 months is typical when developing a new 5-year plan.

Roles

The role of Council staff is to draft a development timeline with key milestones and Council decisions points identified.

The role of Council members is to review, refine, and approve the planning process to include planning and funding decisions for extra meetings, or a planning retreat.

What do you need to produce and by when?

Ideally, a development timeline would be drafted prior to or at the beginning of calendar year 2025. This will enable meetings to be scheduled and approved by the Council as development begins.

Developing a Planning Timeline for the 2027-2031 | 5-Year Plan

Suggested General Timeline for an 18-month process.

Month and Year	Key Milestones
January – May 2025	CRA Parts A-C and Public Input
June – September 2025	Review all public input and data to identify areas of importance to guide goal/objective development.
Oct. 2025 – March 2026	Present data to Council and draft goals, objectives, and goal rationale. (CRA Parts D-E).
April – May 2026	Release goals and objectives for public comments and Council to review significant comments.
June – August 2026	Make final revisions, Council approval and submit.

Common methods for creating a timeline include aligning state plan development activities with Council meetings and aligning with the required sections of the state plan template.

Some Councils consider adding special meetings or hosting a planning retreat (if funding is available) to accomplish state plan development work.

Consider these items when developing your timeline.

- ✓ Identify the due date.
- ✓ Identify key milestones.
- ✓ Create a “to-do” list.
- ✓ Estimate how long each task will take.

- ✓ **Identify things on the “to-do” list that are dependent on other tasks.**
- ✓ **Develop a timeline.**

Note: Your Council timeline may be longer than 18 months or less based on your State or Territory factors such as staff capacity and the amount of information to gather and analyze.

The following information is a **listing of tasks that must be done to complete the 5-Year State/Territory State Plan Template** (note: this listing represents items that must be addressed in completing the State plan template. You may need to include other tasks based on your planning process).

We recommend Councils develop a plan to complete the tasks and include the following: Task, person(s) responsible, Council member action needed, note the dependency of the task related to other tasks, and timeframe.

List of 5-year plan tasks aligned with the State/Territory Plan Template

Comprehensive Review and Analysis

- Gather information from various sources to address sections A, B, and C in the CRA. This includes State Data, Portrait of the State Services and Analysis of State Issues and Challenges (US Census Bureau, American Community Survey, Residential Data and waiting list data and information).
- Get public input on issues of importance to people with ID/DD and their families. Include unserved and underserved communities in your outreach to gather public input.
- Analyze the adequacy of current resources and projected availability of future resources to fund services.
- Analyze the adequacy of health care and services, supports, and assistance that people with ID/DD receive in facilities.
- Analyze the adequacy of home and community-based waiver services, supports, and other assistance that people receiving home and community-based waiver services receive.
- Analyze the information and data collected and develop meaningful summaries to inform the Council members about the services, supports and other assistance available and the extent of unmet and under-met needs.
- Identify areas of importance to guide the Council's development of goals and objectives.
- Review the 4-year overview analysis from the FFY 2025 PPR to determine what/if any current state plan efforts need to be brought forward to the new 5-year plan.

Example of a Task dependency note! Complete the Comprehensive Review and Analysis tasks **BEFORE** moving to the Developing Goals, Objectives, Rationale, and Strategies tasks.

Developing Goals and Objectives and Consider Strategies

- Present the summary of data including public input to the Council members.
- Present areas of importance the Council to guide the development of goals and objectives.

- Develop goals, objectives, and consider strategies that reflect the unmet or under-met needs of people with ID/DD and their families.
- Ensure the goals and objectives are supported with the data and information included in the CRA.
- Develop the Rationale for Goal Selection
- Ensure 3 specific goals or objectives address the following:
 - Self-advocacy requirements. There are three that must be active each year of the 5-year plan.
 - Targeted Disparity requirement. This item must be active each year of the 5-year plan.
 - Planned DD Network Collaboration requirement.
- Council members approve the draft goals and objectives to be released for public comment.

Public Comment

- Publish the draft goals and objectives in a variety of formats, in plain language and in accessible formats with a 45-day public comment period (calendar days).
- Gather comments and organize them into two major categories, non-substantial and substantial.
- Present the substantial comments to the Council and have them consider modifying the goals and objectives or approving them as is. (Note, if the Council modifies the draft plan, a second public comment period is required).
- Summarize the number of responses, types, and what action the Council took on the substantive comments and add to the plan.

Evaluation Plan

- Develop an outline of how the Council will examine progress made each year.
- Identify and explain the evaluation methods that will be used to determine if the identified needs are being met and the expected outcomes are being achieved.
- Determine the Council's role in reviewing and commenting on progress made.
- Determine how the annual review of progress will help identify areas where updates to the 5-year plan are needed.

Logic Model

- Develop a **5-year** logic model that shows connections between Council activities and desired outcomes. Include information on resources, strategies/activities, outputs, short-term, intermediate, and long-term outcomes.

Projected Budget for the 2027 federal fiscal year.

- Develop a budget amount for each goal showing federal and other funding (if appropriate).

Consultation with the DSA and Assurances

- Consult with the DSA (if you have one) to ensure the plan is consistent with State or Territory law.
- Obtain the appropriate assurances for the 2027-2031 | 5-year plan and keep the original copy on file at your Council office and save a copy on your computer with a back-up file.

Annual work plans for federal fiscal year 2027 and 2028.

- Identify the goals and objectives that will be included in the Annual Work Plan(s).
- Identify the key activities the Council will use to reach the objective and support progress toward the 5-year goal.
- Identify expected outputs, outcomes, the data you will use to evaluate progress, and project the performance targets for all activities under the objective(s).

For more information

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