

*Strategic Goal Setting with the Developmental Disabilities Councils*

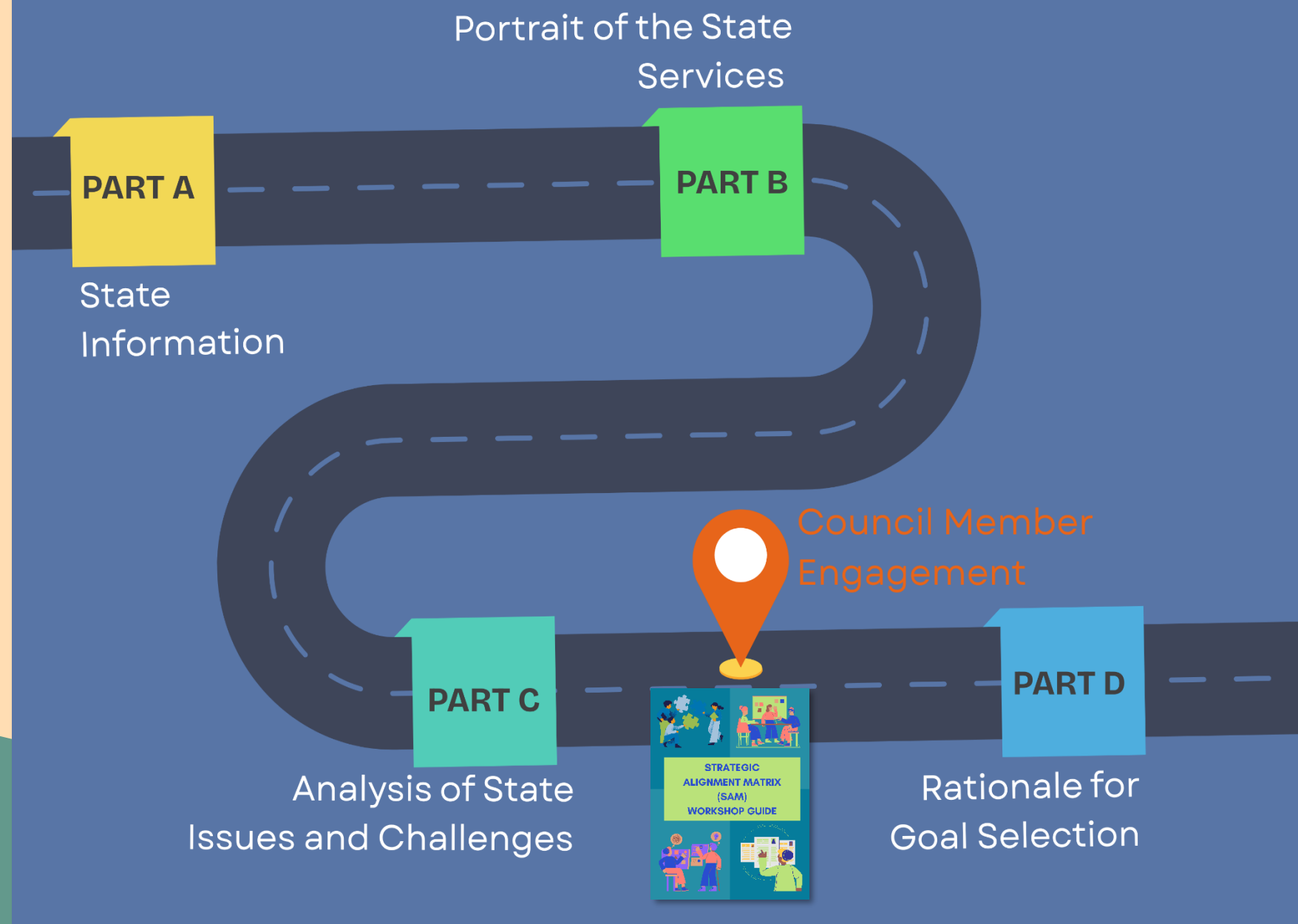
# SAM WORKSHOP GUIDE

## AN ORIENTATION

Presentation by Partnerships For Health



# GOAL DEVELOPMENT AND THE COMPREHENSIVE REVIEW AND ANALYSIS PROCESS



## SESSION OBJECTIVES

Understand the purpose and structure of the SAM Workshop Guide

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Review the six step SAM Workshop

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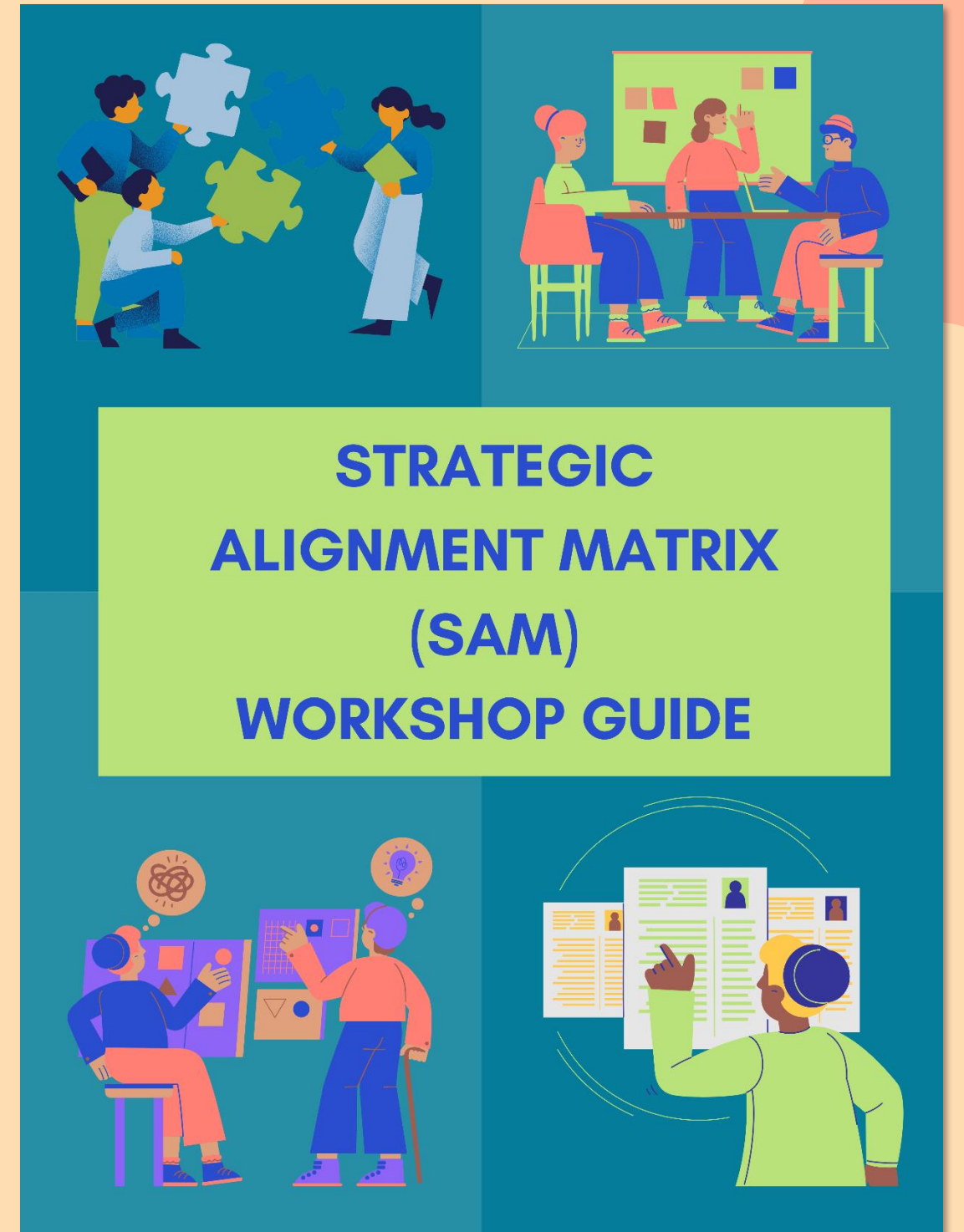
Discuss key tools and facilitation tips

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Clarify next steps for using the Guide with Council members

# PURPOSE OF THE GUIDE

- 1** Provide DDC staff with a structured, inclusive planning framework.
- 2** Align proposed goals and objectives with DD Act and CRA findings.
- 3** Support transparent criteria-based decision-making.
- 4** Center Council members' voices in strategic goal setting.

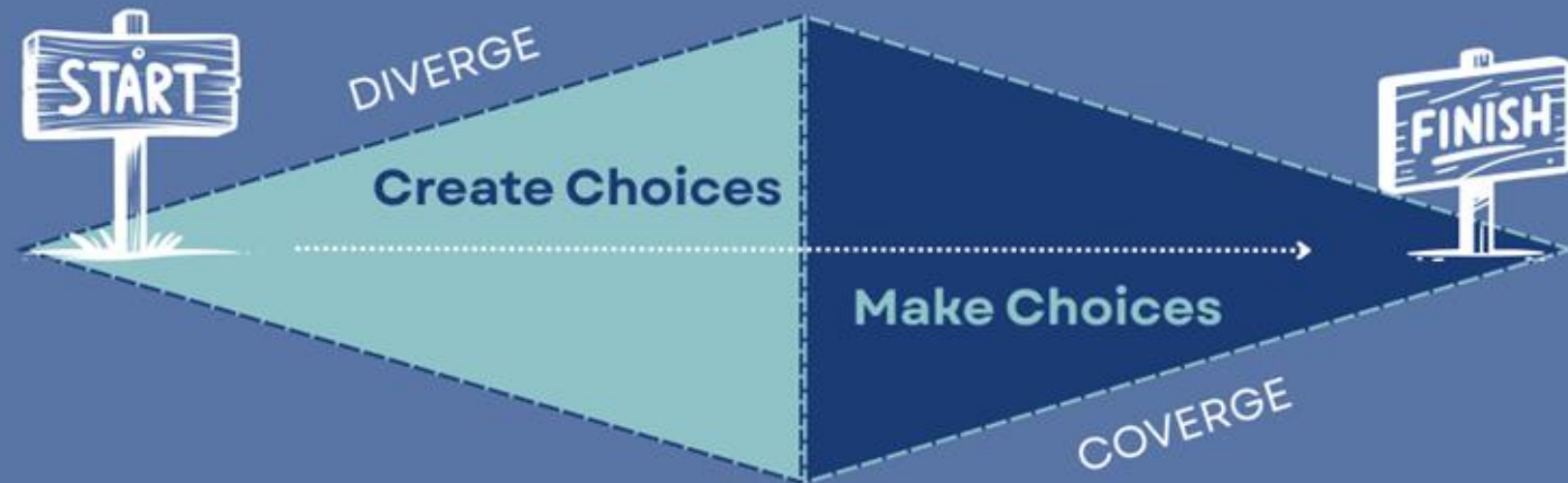


# THEORETICAL FRAMEWORK

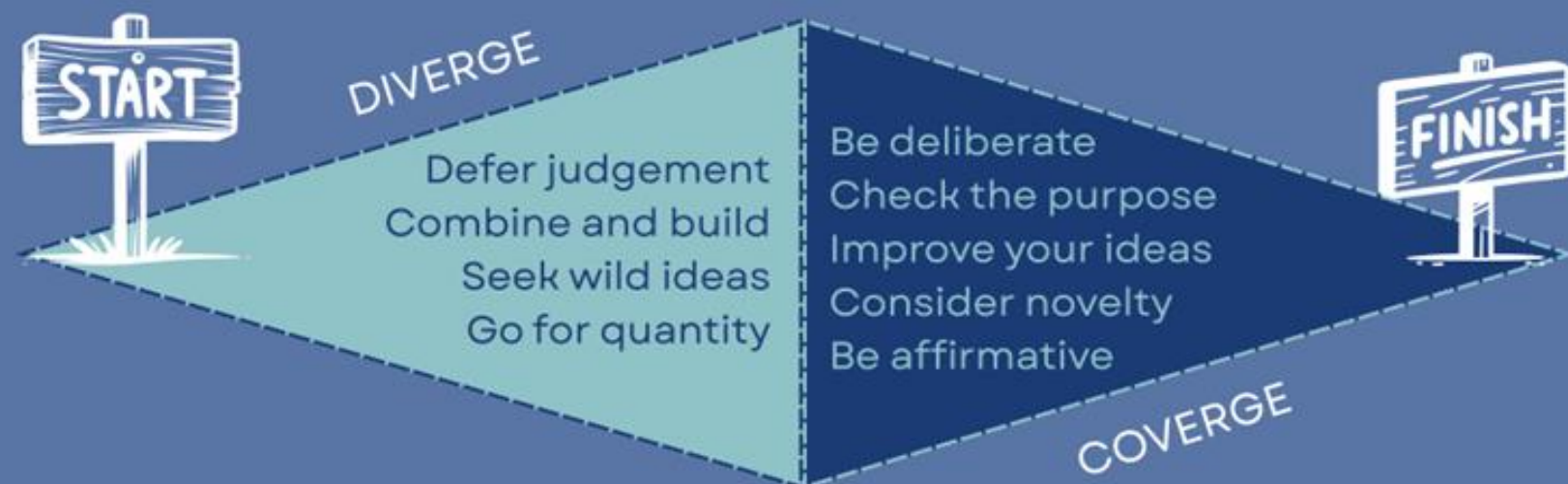


## DIVERGE-ORGANIZE-CONVERGE

### THE PROCESS



### THE RULES



# GUIDE STRUCTURE

## THE GUIDE HAS THREE PARTS

Pre-Workshop Preparation

SAM Workshop

Post-Workshop Synthesis



## SIX STEP, EACH WITH ...

Facilitator Objectives

Timing

Format Options

Materials

Tools

Discussion Prompts

Sample Script



# PRE-WORKSHOP PREPARATION

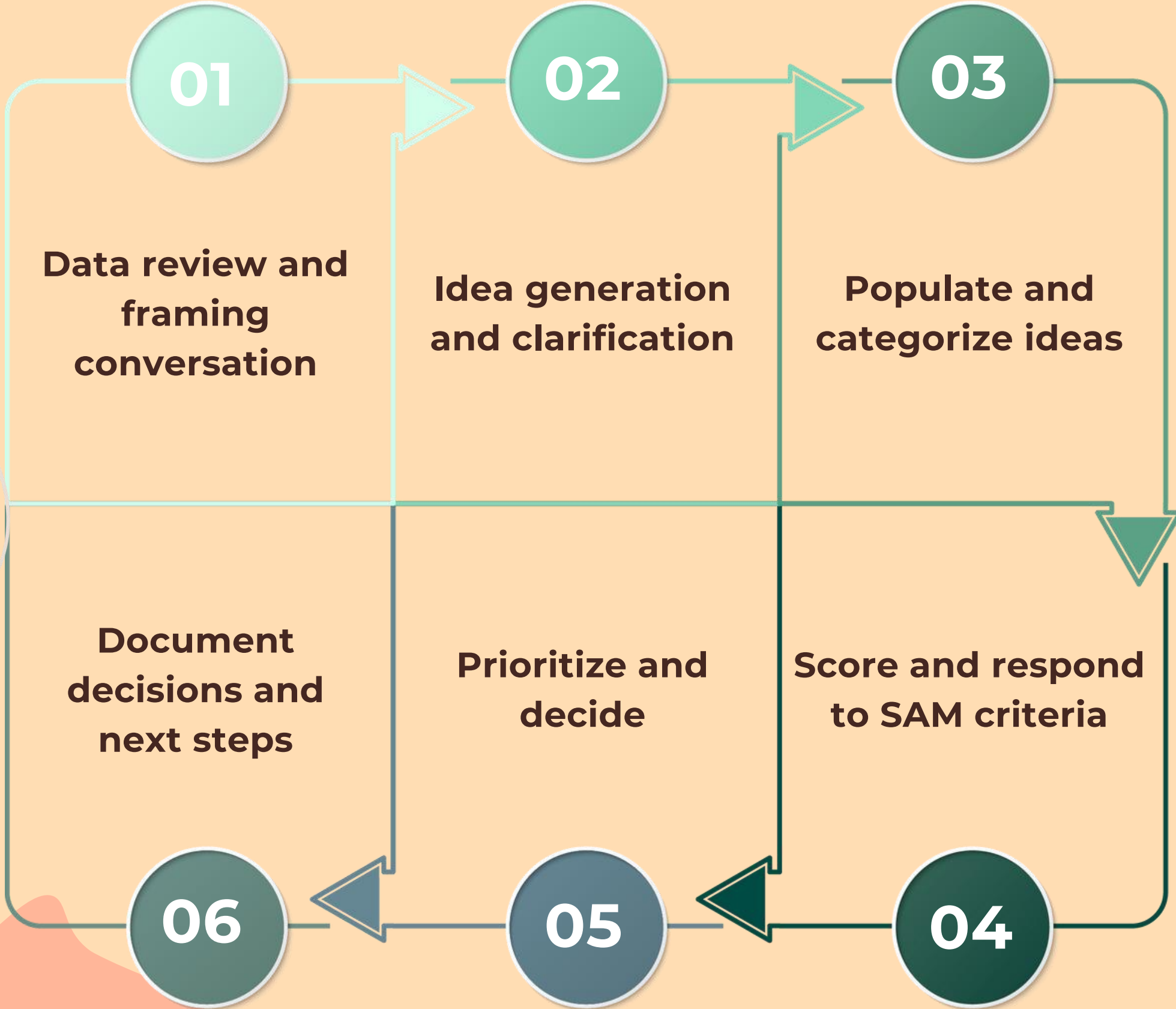
## SETTING THE STAGE WITH DATA

TOPIC AREA	DATA POINTS
Health and healthcare	% of adults with I/DD without a primary provider
Employment	Labor force participation rate among adults with I/DD
Housing	# of people with I/DD in non-family housing

## MANAGING EXPECTATIONS



# SAM WORKSHOP STEPS



# WORKSHOP OVERVIEW

## OBJECTIVES

- **Review** state-specific **data** and community input.
- **Brainstorm** potential goals and objectives.
- **Assess** each idea against a shared set of criteria.
- **Prioritize** and **select** initiatives for Council's strategic plan.
- **Document** key decisions and outline next steps.



## FORMAT OPTIONS

- One session (4 hours)
- Two sessions (2 hours x 2)

## TOOL

- Annotated Agenda

# STEP 1 DATA REVIEW AND FRAMING CONVERSATION

## OBJECTIVES

- Ground participants in key findings from CRA.
- Ensure a shared understanding of needs, gaps, and opportunities.
- The goal is not to analyze or interpret the data in depth, but to use it as a launching point for idea generation.



## FORMAT OPTIONS

- Data Walk
- Group Walkthrough

## TOOL

- Topic Areas and Data Tables

# STEP 2 IDEA GENERATION AND CLARIFICATION

## OBJECTIVES

- Collect ideas for potential goals and objectives.
- Introduce brainstorming activity.
- Encourage broad, inclusive participation.
- Set the tone for collaborative, creative thinking.



## FORMAT OPTIONS

- Central Scribe
- Stickies

# STEP 3 POPULATE AND CATEGORIZE IDEAS

## OBJECTIVES

- Help participants make sense of ideas by organizing them into logical groups or categories.
- Prepare for deeper analysis by identifying connections without prioritizing ideas.

## FORMAT OPTIONS

- Facilitator-Guided Clustering
- Participant Sorting (Gallery Walk)

## TOOL

- SAM Clustering Worksheet



# STEP 4 SCORE & RESPOND TO SAM CRITERIA

## OBJECTIVES

- Guide Council members through a conversation to assess proposed goals and objectives against the SAM criteria.
- Surface insights.
- Identify strengths and concerns.
- Gather input to inform decision-making and prioritization.

## FORMAT OPTIONS

- Facilitated Scoring Conversation
- Small Group Evaluation

## TOOLS

- SAM Scoring Sheet
- SAM Excel Tool



# SAM'S NINE CRITERIA

CRITERIA	DESCRIPTION
<b>Federal Mandate Fit</b>	Is the Initiative required or strongly encouraged under the DD Act or related federal guidance?
<b>Data Alignment</b>	Does the initiative respond to clear needs identified in national, state, or Council-specific data?
<b>Mission Alignment</b>	Does the initiative support the Council's vision, values, and long-term outcomes?
<b>Partner Support</b>	Is there strong support from community or agency partners to implement this initiative?
<b>Evidence Base</b>	Is there credible research or practice-based evidence to support this strategy or model?
<b>Implementers' Capacity</b>	Do we have a clearly identified lead (internal or external) with the capacity to carry it out?
<b>Feasibility</b>	Given current funding, staffing, and timing, how realistic is this initiative to implement?
<b>Reach and Benefit</b>	How many people with I/DD and families will this initiative reach, and how will it improve their lives?
<b>Projected Impact</b>	Will this initiative result in meaningful change – either short-term wins, systemic reform, or both?

# STEP 5 PRIORITIZE & DECIDE

## OBJECTIVES

- Help participants translate SAM scores and discussion outcomes into ranked list of initiatives.
- Support the group in selecting initiatives that will move forward.

## FORMAT OPTIONS

- Ranking and Selection Discussion
- Dot Voting or Digital Polling



# STEP 6 DOCUMENT DECISIONS AND NEXT STEPS

## OBJECTIVES

- Ensure decisions are recorded with context and rationale.
- Define concrete next steps and ownership of tasks.

## FORMAT OPTIONS

- Facilitator-Guide Wrap Up
- Collaborative Summary Writing

## TOOL

- Final Priorities and Rationale Worksheet



# POST-WORKSHOP SYNTHESIS

## OBJECTIVES

- Consolidate results of the SAM Workshop into a summary to guide the drafting of the 5-Year Plan.
- Ensure all decisions are captured, rationale preserved, and outstanding questions are flagged for follow-up.

## SYNTHESIS TASKS

- Review worksheets, scores, and notes.
- Clean goal / objective language.
- Draft rationales for included or excluded initiatives.
- Identify gaps or clarifications needed.
- Translate top priorities into 5-Year Plan draft.
- Share draft with Council members for review and feedback.



# FACILITATION TIPS



Can be delivered as one 3.5 - 4-hour session or two shorter sessions.



Use silent scoring before discussion to balance voices.



Encourage broad participation in idea generation.



Assign roles for note-taking and facilitation.



Document rationale for each decision.



# THANK YOU FOR LISTENING!

If you have any questions, feel free to reach out to us through any of the following:

## WEBSITE

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