

Best Practices when Transitioning to a new 5-Year Plan (ITACC, ACL Contract #75P00121C00067)

Close Out the Current 5-Year Plan on Purpose

- Review each goal, objective, and major strategy
- Note what was completed, partially completed, or not started
- Identify key results and impacts
- Acknowledge external factors (funding changes, emergencies, policy shifts)

Celebrate Achievements and Contributions

- Publicly acknowledge progress and successes
- Thank Council members, staff, partners, and community contributors
- Share short stories of impact, not just numbers
- Document achievements for future reference

Use What You Learned to Shape What Comes Next

- Identify strategies that worked well and why
- Name strategies that need to change or stop
- Look for gaps or unmet needs
- Carry forward successful practices

Reconfirm Mission, Vision, and Values

- Revisit the mission and vision with the Council
- Confirm they still reflect the Council's purpose
- Update language if clarity or inclusiveness can improve
- Reaffirm core values

Engage the Right People Early

- Involve staff early in planning conversations
- Seek input from people served, families, and partners
- Use accessible engagement methods (plain language, multiple formats)
- Be clear about how input will be used

Align Timing, Resources, and Reality

- Review available funding and staffing
- Set realistic timelines
- Avoid overloading the plan with too many priorities

Create a Clear Bridge Between Plans

- Clearly state what continues from the prior plan
- Identify what is new or changing
- Explain why changes were made
- Align ongoing initiatives with new goals

Develop an Early Implementation Plan

- Identify annual priorities
- Assign responsibility for each activity
- Set simple measures of progress
- Schedule regular check-ins

Communicate Clearly and Often

- Share a plain-language summary of the new plan
- Use visuals, timelines, and one-page overviews
- Repeat key messages across meetings and materials
- Connect everyday work back to the plan

Treat the Strategic Plan as a Living Guide

- Review progress consistently throughout the year (i.e., quarterly)
- Adjust strategies when conditions change
- Use the plan to guide agendas and priorities
- Document lessons learned along the way