




Transitioning to a New 5- Year Plan



What this session will cover

 Plan Transitions	 Learn from Others	 5-Year Overview
Best practices for moving between plans	Real examples from DD Councils	How the PPR guides transitions

Best Practices

Reflect and Learn

- Close out the current plan with purpose
- Celebrate achievements and contributions
- Use what you learned to shape what comes next

Plan and Align

- Reconfirm mission, vision and values
- Engage the right people early
- Align timing, resources and reality
- Create a clear bridge between plans
- Communicate clearly and often

Implement and Adapt

- Develop an early implementation plan
- Treat the strategic plan as a living guide




Reflect and Learn

Close Out the Current 5-Year Plan on Purpose

Before starting a new plan, take time to close out the old one.



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 & why



Name strategies
that need to change or stop



Look for gaps
or unmet needs



Carry forward
successful practices

Plan and Align

Reconfirm Mission, Vision, and Values

Over time, context changes – even if purpose does not.



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

A smooth transition includes voices beyond the Council.



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

Plans work best when they match real capacity.



Review available funding
and staffing



Set realistic timelines



Avoid overloading the plan
with too many priorities

Create a Clear Bridge Between Plans

Help people see continuity, not disruption.



Clearly state what continues from the prior plan



Identify what is new or changing



Explain why changes were made

Communicate Clearly and Often

People need time to understand and adopt a new plan.



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



Implement and Adapt

Develop an Early Implementation Plan

Momentum matters in the first year.



Identify annual priorities

Assign responsibility for each activity

Set simple measures of progress

Schedule regular check-ins

Treat the Strategic Plan as a Living Guide

A plan should guide decisions, not sit on a shelf.




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

5-Year Overview

Program Performance Report
(PPR) Item



As you wrap up the current 5-year plan

- There is a required PPR reporting item that puts the best practice of closing out the current 5-year plan on purpose in action.

Current PPR instructions:

Use your five-year goal outcome statements as the guide to provide the information.

- Assess the extent to which you achieved the outcomes as stated in your five-year goal outcome statements.
- Describe your major accomplishments.
- Describe any factors that got in the way of goal achievement.
- Describe the extent to which people who participated in your activities were satisfied.

5-Year Overview (FY2026) Simple Reporting Guide

Start with Your Goals

What did you say you would achieve?

Check What You Achieved

Fully, partially, or not achieved. Use numbers.

Highlight Accomplishments

What changed, who benefited, results.

Explain Challenges

Staffing, funding, delays, barriers.

Share Feedback

Satisfaction results from wide range of people and key takeaways.

Keep it clear

Plain Language, short, focused

TRANSITIONING

TO A NEW STATE PLAN

Celebrating Achievements and Contributions

Florida Developmental Disabilities Council, Inc.
ITACC Institute
April 30, 2026



Presentation Summary and Timeline

Transitioning from the 2017-2021 to 2022-2026 State Plan

September 2021 State Plan Committee and Full Council meetings

Creating outcome content for the PPR 5-Year Look Back / Goals and Outcomes

October – December 2021

Creating a simplified version: “Goals & Outcomes: Our Five-Year State Plan in Review: 2017–2021”

January – May 2022

Sharing the ultimate outcomes and resources with the Council and public

May 2022 and ongoing

What We've Accomplished Together 2017-2021

Commitment

53 State Plan
Projects

4
Collaborative
Projects

\$12,291,736
Total
Investment

Outcomes
Forthcoming



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What We've Accomplished Together 2017-2021 — Goal Outcomes

Systems
Change
Models

Research

Guides

Curricula
and
Training
Materials

Online
Training,
Modules,
Resources

Summits /
Strategic
Planning

Full Council

Goal 5: Self-Advocacy | Systems Change

Outcomes

A minimum of one systemic change to federal and/or state statutes, rules, policies or procedures mitigating the income limits on people with I/DD will be implemented resulting in the restoration of their ability to independently control their income.

✓ **Achieved**



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Working People with Disabilities



Working People with Disabilities

**Report to the Florida Legislature
November 30, 2018**



5-Year Look Back / Goals and Outcomes

Organization of Comprehensive Report

5-Year Goal Expected Outcome(s)

Key Project/Activity Aggregate Outcomes

Legislative Outcomes

Major Projects & Activities

Performance Measures*

Significant Outcomes by Project/Activity

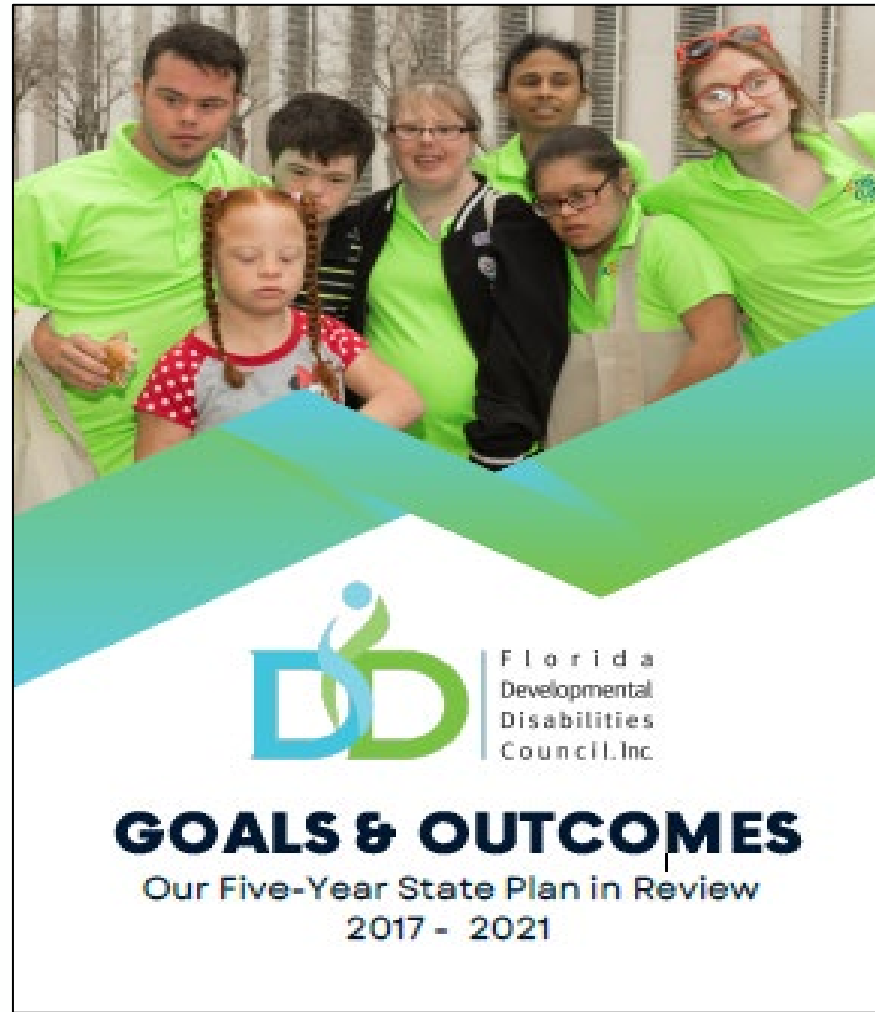
Performance Measures Explained

Systems Change

Individual and Family Advocacy (IFA)



Goals & Outcomes Flipbook



TRANSPORTATION

Goals & Outcomes

1

Develop and implement a minimum of three sustainable transportation solutions.

2

Execute a minimum of one infrastructure change, resulting in increased access to safe and affordable transportation.



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Dollars Leveraged

The Council's investment of \$708,000 leveraged an additional \$31,250,000 of support for innovative transportation projects, leading to increased safe and affordable transportation options.



Legislative Impact

Transportation Network Companies (TNC), including Uber and Lyft are now authorized to provide non-emergency transportation services to persons receiving Medicaid; drivers and prospective drivers are now required to undergo background screenings; and additional dollars were awarded to implement Innovative Service Development projects, increasing access to several transportation options for persons with disabilities in several counties.

Making a Difference



232,813 Unique Trips

via Hillsborough Area Transit Authority (HART), the Treasure Coast and the Pinellas Suncoast Transit Authority transportation projects



1 Self-Advocate

appointed to the Florida Commission for the Transportation Disadvantaged in September 2019



21 Counties

began implementing The Florida Commission for the Transportation Disadvantaged's Innovation and Service Development project in 2020.



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EMPLOYMENT

Goals & Outcomes

1

Increase the number of individuals gaining employment at or above minimum wage by 25% over the established 2014 Employment First baseline data.

2

Since 2014, Florida's Employment First efforts exceeded the number of individuals gaining employment at or above minimum wage by 48% over baseline data.



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Dollars Leveraged

The Council's investment of nearly \$2.8 million leveraged a total of \$4,550,000 in state appropriations for the Employment Enhancement Program (EEP) over the life of this state plan.



Legislative Impact

Funding was appropriated for the EEP in varying allocations to the Agency for Persons with Disabilities (APD) to help individuals on the waiver waiting list obtain jobs and maintain employment; the Reimagining Education and Career Help (REACH) Act of 2021, will result in a system-wide approach to improving equity and access to workforce training and education for all Floridians with an increased focus on underserved populations.

Making a Difference



2,445 Individuals

were educated or trained through the Council's employment efforts in practices designed to improve employment outcomes.



1,703 Individuals Employed

through APD's EEP and Rural Routes to Employment initiative.



78.8% Employment Rate

for 825 Project SEARCH Youth Model participants was achieved over the life of this state plan. Florida has 41 Project SEARCH sites which represent the greatest number of sites in the nation.



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Florida Resources

What We've Accomplished Together

- State Plan Committee PowerPoint – September 23, 2021

What We've Accomplished Together

- Full Council PowerPoint – September 23, 2021

5-Year State Plan Look Back

- Full Council PowerPoint – May 19, 2022

Comprehensive 5-Year Look Back Goals and Outcomes Report

- Full Council – May 19, 2022

Goals & Outcomes: Our Five-Year State Plan in Review 2017–2021

- Simplified Flipbook or Downloadable Version:

[Five Year State Plan - FDDC](#)

Presenters

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Questions / Discussion

- Transitioning between plans and celebrating Council members' contributions
- Creating content for the PPR and 5-Year Look Back / Overview of Goal Outcomes
- Creating and sharing a simplified version for Council members and the public





Council on
Developmental Disabilities

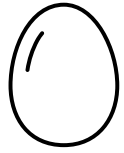
Communicating Long-term Impact

Jolene Sharp, Chief Strategy Officer

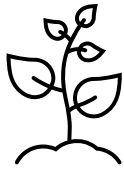


The Challenges

Councils Are Initiators, Not Sustainers



By design, councils incubate new ideas.



Longer-term projects need sustainable funding and resources to grow. That usually means a new home.



Let's be honest: that also means people forget where it all started!

Councils Are Facilitators

Our role is often **in the background**:

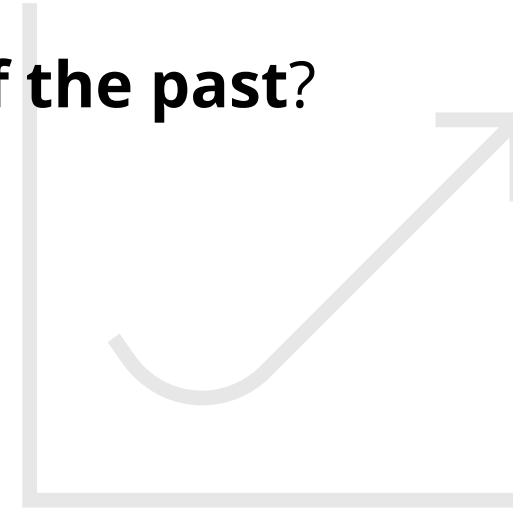
- Identifying the need
- Gathering information
- Getting parties together in a room
- Building trust
- Setting a vision and plan for progress
- Problem solving
- Providing accountability

Systemic Change Takes Time

- Council impact often develops over many years – sometimes spanning state plan cycles.
- The story isn't just the end point.
- **How we got there over time** may be just as important.

History Can Fade


- After a project or state plan is over – what happens to the **stories of the work we did**?
- How do we communicate the **LASTING impact** of decades of work?
- How do carry forward the **lessons of the past**?





An Impact Timeline

Capturing a History of Impact



Council on
Developmental Disabilities

Go to TN.gov

Search Council on Developmental Disat

Who We Are Engage with Us Current Priorities TN Disability Pathfinder 50th Anniversary Leadership Series

Who We Are

- Council Staff
- Council Members
- State Plan and Goals
- Values and Best Practices
- Our Impact Over Time**
- Our Impact: Testimonials
- TN Disability Data
- Special Reports
- Funding Disclaimer and Title VI
- FY24 Annual Report

Our Impact Over Time

Personal Impact of Our Work (Videos & Quotes)

1975-1995 1995-2005 2005-2015 2015-Today

- **1975** – Tennessee establishes its **Council on Developmental Disabilities** by governor's order, following the **creation of councils nationwide** through [the DD Act five years earlier](#).
- **1985** – A national employment grant helps the council **launch Tennessee's first supported employment programs** for people with intellectual and developmental disabilities, **opening new doors to meaningful work**.
- **1989** – **People First of Tennessee** emerges as a statewide self-advocacy group with Council support. The organization goes on to lead transformative change, **including the successful effort to close state-run institutions** for people with developmental disabilities. [The group continues its vital work today through The Arc Tennessee.](#)
- **1989** - A new alliance of disability organizations is created with Council funding as the [Tennessee Disability Coalition](#). The Coalition continues **advocating for disability rights and services** across Tennessee today. [Read more about the start of the Coalition here.](#)
- **1993** – [Partners in Policymaking® Leadership Institute](#) begins **training Tennesseans with disabilities and family members** in advocacy skills. Nearly 600 graduates have transformed communities across Tennessee, since then, **influencing policy from local to national levels**. The program goes on to celebrate its **30th year** in 2024.
- **1995** – The "**Home of Your Own**" initiative breaks down barriers to home ownership for people with developmental disabilities. The initiative **educates banks and lenders about supporting home ownership** for people with intellectual and developmental disabilities. During the project, **132 people purchase homes**, 73 move from institutions into the community, 185 affordable and accessible housing units become available, and 240 people with disabilities receive home ownership training.

Capturing a History of Impact: Closer Look

Our Impact Over Time

Personal Impact of Our Work (Videos & Quotes)

1975-1995

1995-2005

2005-2015

2015-Today

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Capturing a History of Impact: Recent Projects

- **2022** - Through the [advocacy of Council member Chrissy Hood and her family](#), the Tennessee General Assembly **approves \$1 million to launch a statewide grant program run by the Tennessee Department of Disability and Aging to pay for **adult-size changing tables** in public places across the state.
 - At the same time, the Tennessee Department of Transportation commits to install these tables in **all rest areas and welcome centers**.
 - The Tennessee Department of Environment and Conservation/Tennessee State Parks also commits to **installing them across state parks**. These tables give adults with disabilities **a safe and dignified place** to be changed when they are out in public.
 - [Read more about the project on this page.](#)**
- **2024** - The legislature makes the rules **clearer** about which tables qualify for grants and **raises the grant awards** to up to \$10,000 per table. This increase helps **more** locations afford to install these important facilities.
 - By mid-2024, **40+ adult-size tables have been funded statewide** through the grant program, including at Dollywood, Nissan Stadium, and the Creative Discovery Museum.

The screenshot shows the top navigation bar of the Council on Developmental Disabilities website. It features the TN logo and the text "Council on Developmental Disabilities". A search bar is visible on the right. The main navigation menu includes: Home, Who We Are, Engage with Us, Current Priorities, TN Disability Pathfinder, and 50th Anniversary Leadership. A dropdown menu is open under "Who We Are", showing "Behavior Supports" and "Safety Priorities". Below the navigation bar, the text "Our Impact Over Time" is partially visible.

Capturing a History of Impact: Breaking Ground

- Our quarterly magazine is another venue for capturing long-term impact.
- 50th anniversary edition in 2025
- Past features have included:
 - A “where are they now” feature of the first inclusive higher ed grads in TN
 - A Partners in Policymaking 30th anniversary feature issue
 - An update on childcare resource centers



Grounding New Members in Past Impact

- Past projects from the timeline are an important part of new member orientation

Your fellow members



Your fellow members



Questions?

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(615) 917-0824

Transitioning to a New 5-Year State Plan

Chelsea Burke

Operations Manager

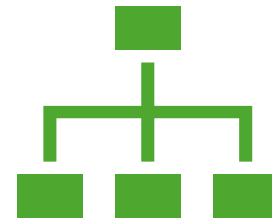
Alaska Governor's Council
on Disabilities and Special
Education



Context First



Leadership
transition



New plan structure

System change

(not just content)

Staff burden + alignment

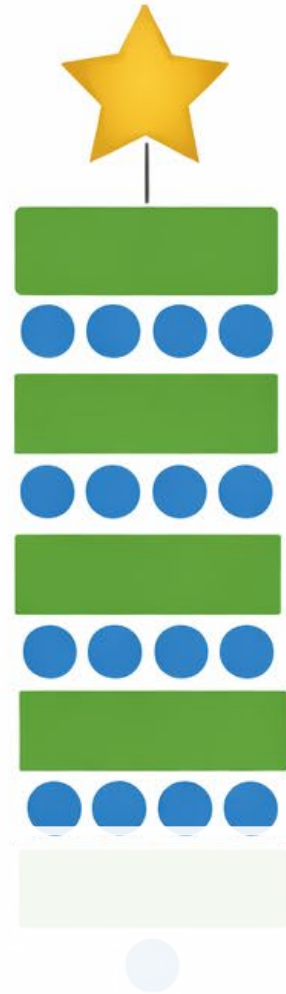
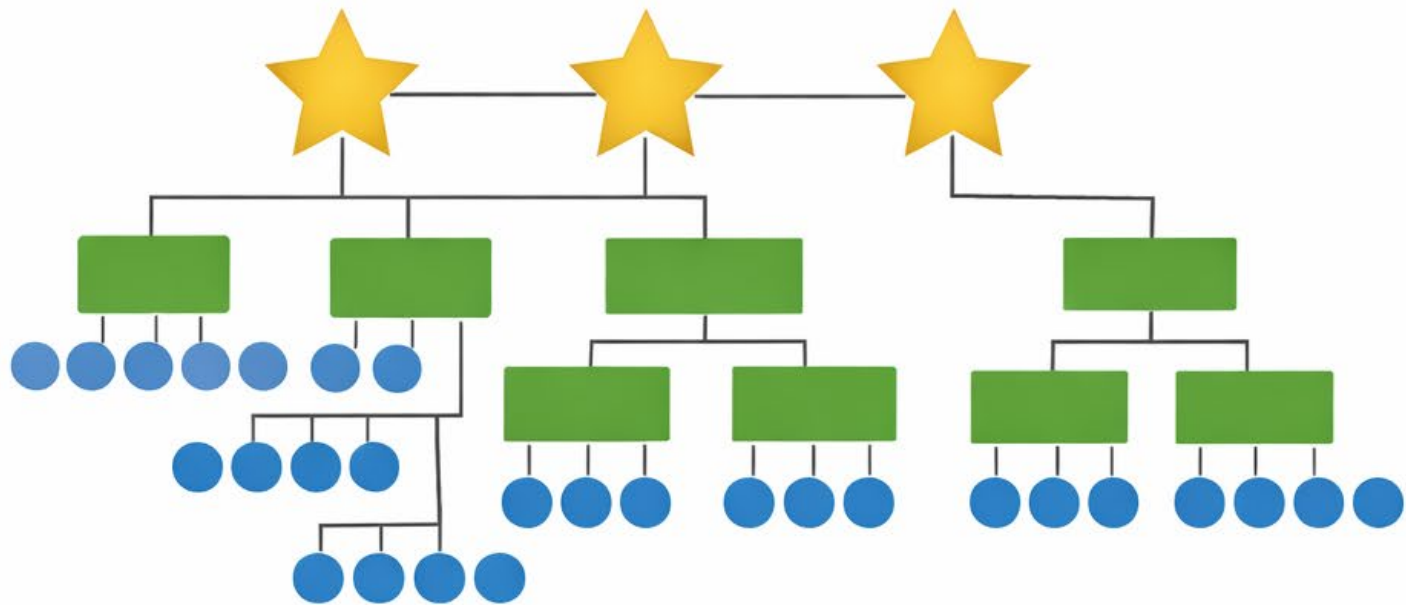
The Shift We Made

Old → New

Multiple goals → One goal

Complex → Plain language

Fixed → Flexible



Old Plan vs New Plan

Plan Visuals

SIX OBJECTIVES

Self-Advocacy
and Leadership

Systems
Coordination
and Policy
Change

Education,
Transition, and
Lifespan
Supports

Community
Inclusion and
Access

Employment
and Economic
Participation

Emergency
Preparedness
and System
Resilience

Self Advocacy & Leadership- Sample Activities



Supporting an Alaskan
self advocacy
organization



Leadership
Training/Development



Coalition and Group
Leadership support



Committee, event,
policy participation

The One-Pager

2027–2031 Five-Year Plan Snapshot

Goal: Systems Change & Shared Vision

By 2031, Alaska will have stronger, more coordinated, and more inclusive public systems that support people with intellectual and developmental disabilities across the lifespan.

Objectives:

1. Self-Advocacy and Leadership
2. Systems Coordination and Policy Change
3. Education, Transition, and Lifespan Supports
4. Community Inclusion and Access
5. Employment and Economic Participation
6. Emergency Preparedness and System Resilience

Why This Plan:

- One clear goal
- Flexible and responsive
- Easier reporting
- Focused on systems change
- Grounded in Alaska’s Shared Vision

Where It Went Wrong

Clear for some

Too vague for others

“What does this actually look like?”

“What do staff do?”

What We Learned

The issue wasn't the
plan.

It was understanding the
system.

What We Did First

Added more
detail

Created
layered
materials

The Real Solution

Education +
Communication
=Trust



Explain the
system



Show
connections



Create
access points

What We Implemented



TRAININGS



MONTHLY
UPDATES



OFFICE
HOURS



ONGOING
ENGAGEMENT

Monthly Micro-Trainings



30 minutes



Plain language



Built from ITACC
resources

Monthly Staff Updates

Short
updates

What staff did
this month

Shared with
full council

Office Hours / Coffee Talks



1 HOUR/MONTH



OPEN + INFORMAL



Q&A SHARED WITH
ALL

Prioritize council business

Add committee work sessions

Increase touchpoints

Opportunity for all to engage

Embedding
the Work

Reality Check

Minimum allotment
council

Minimum resources

Simple + consistent

Key Takeaways

Plain language ≠ full understanding

Understanding builds trust

Layer communication

Create access points

Simple + consistent works

Q&A or Discussion

Which of these strategies would be most realistic for your council?

- Trainings
- Monthly updates
- Office Hours

Thank you!

Chelsea Burke
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Contact and Contract Information

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Training and technical assistance resources: itacchelp.org

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