

State Plan Development Workgroup Report

***Part 1:* SAM Process Summary**

What happened at the Workshop?

In the fall of 2025, a workgroup of UDDC members met a few times and utilized the Strategic Alignment Matrix (SAM) tool. The SAM tool helped create a step-by-step process for Council members to develop their new five-year State Plan.

What did they do in the workgroup?

The workshop uses a three-part design (Diverge–Organize–Converge) to help people be creative, think clearly, and make good decisions.

1. **Reviewing Data and Framing the Conversation:** Participants looked at the main findings from the first step in creating a new State Plan, the Comprehensive Review and Analysis (CRA). This created a shared understanding of the problems, missing resources, and opportunities in the state. This was the starting point for developing new ideas.
2. **Generating and Clarifying Ideas:** Council members quickly came up with many possible topics in the areas of health, housing, community support and employment. The focus was on creative, broad thinking, and capturing the ideas as short, clear phrases.
3. **Categorizing and Populating Goal Areas:** The brainstormed ideas were put into logical groups or themes. The purpose was to organize the total set of ideas and remove duplicate ones without judging or evaluating them yet.
4. **Evaluating Goal Areas:** This main step involved participants assessing each potential goal area against the nine SAM criteria one by one. They scored each area (from 0 to 5) and discussed it to share insights and concerns.
5. **Prioritizing and Deciding on Goal Areas:** The SAM scores and discussion results were used to create a ranked list. The group reviewed the highest-scoring items and any areas considered "essential," then narrowed the list to a practical set of priorities by reaching a consensus.
6. **Documenting Decisions:** The final, chosen list of goal areas was clearly recorded, along with the reasons why each was selected or postponed.

How does the SAM work?

The SAM is a simple scoring tool that helps the Council decide which ideas are most important. It takes a long list of ideas and narrows it down to a few top goals. People use a scale of 0 (lowest) to 5 (highest) to rate each idea against the same nine standard rules, called SAM Criteria.

The SAM Criteria is listed to show what factors the workgroup were looking at when reviewing each idea.

SAM Criteria	Focus Question
Federal Mandate Fit	Is the goal required or strongly encouraged under the DD Act?
Data Alignment	Does the goal respond to clear needs identified in national, state, or Council data?
Mission Alignment	Does the goal support the Council's vision and long-term outcomes?
Partner Support	Is there strong support from community or agency partners for implementation?
Evidence Base	Is there credible research or practice-based evidence to support the goal?
Implementers' Capacity	Is there an identified lead with the capacity to carry out the work?
Feasibility	Is the goal realistic to implement given current funding, staffing, and timing?
Reach and Benefit	How many people with I/DD and their families will it reach, and how will it improve their lives?
Projected Impact	Will the goal result in meaningful changes, such as short-term wins or systemic reform?

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Part 2:

Rationale and Information

SAM Goal Prioritization

The following table presents the ranked list of potential goal areas for the new five-year State Plan, based on the scores derived from the Strategic Alignment Matrix (SAM) process. The Overall SAM Score is the aggregate of all participant scores across the nine SAM criteria.

Workgroup Rank	Category	Overall SAM Score
2	Community Supports	186
3	Health	172
3	Employment	117
4	Housing	99
1	Self-Advocacy	66*

Note: The score for Self-Advocacy (66) was specifically related to the "peer supports" idea within that category.

Why did the workgroup rank the categories this way?

Self-Advocacy (Rank 1)

The workgroup assigned the highest priority to Self-Advocacy (Rank 1). This was ranked as the top priority because it strongly aligns with UDDC's mission and values. It is also required by federal law, making it an essential focus. The group agreed that giving people the tools for self-advocacy is the foundation for achieving all other goals. We also included peer support activities in this category, as they are relevant to many other topics.

Community Supports (Rank 2)

Community Supports was ranked second because it also aligns well with our mission. The most important thing identified in this area is finding a dedicated funding source for Home and Community-Based Services (HCBS). To achieve this,

we will need to educate lawmakers and reach out to the community and stakeholders to explain why this funding is necessary and what impact it will have.

Regarding transportation, the main problems are in rural areas. While it's unlikely we can directly fix individual transportation issues, we suggest continuing to work with local governments in the next five years. The UDDC can support rural regions and mobility managers as they identify and work to close regional gaps in transportation.

Health and Employment (Rank 3)

The workgroup acknowledged that Health and Employment are very important. However, to make the best use of the UDDC's limited resources and influence, it was decided not to make them stand-alone goals. Instead, the objectives for health and employment will be included within the broader Community Supports goal. This allows the UDDC to focus its resources while still making sure that important health and employment outcomes are addressed as part of improving the quality of community life.

Housing (Rank 4)

The workgroup felt that other organizations are better suited to lead efforts in housing. The UDDC may consider offering support in this area through training and advocacy about housing rights and resources.