



Developmental Disabilities Alliance of WNY Strategic Plan for 2024-2026

Overview

The Developmental Disabilities Alliance of WNY (DDAWNY) engaged in a strategic planning process beginning in March 2023 and concluding in December 2023. DDAWNY's objectives included establishing core competencies, more clearly articulating the definition of customer, and establishing direction and initiatives for advancing the organization's impact and outcomes over the next 3 years.

Environmental Assessment Themes

Process

As part of the strategic planning process, an assessment of internal and external factors and considerations for the DDAWNY strategic plan was conducted, including:

- Interviews with Board Members and the DDAWNY Association Manager
- Focus Group with five DDAWNY Family Committee representatives
- Stakeholder Interviews (6)
- DDAWNY Agency Executives Survey (n=18)
- DDAWNY Committee Member Survey (n=84)
- Interview with Network In Aging (Charlie Battaglia, past Board Chair)
- Environmental Scan (DDAWNY Board)

A summary of key themes is provided below, pulling together the most consistent feedback across all assessment initiatives.

Themes

All stakeholders recognize DDAWNY as a highly collaborative and non-competitive organization focused on the greater good, which makes it unique and strengthens its value proposition.

Consistent across all stakeholders was the perception of DDAWNY as a highly credible, respected, and effective alliance. Key to its effectiveness is the collaboration and willingness of competing agencies to come together to advocate for the greater good. This was seen as a unique strength that separates DDAWNY from similar coalitions and alliances across the state. DDAWNY's regional focus was also a component of this perception, in that WNY has a uniquely collaborative approach and that it allows DDAWNY to target issues specific to the region.



One of DDAWNY's strengths is its ability to mobilize and address issues quickly with a unified voice.

Also consistent across stakeholders was a positive impression of DDAWNY's ability to quickly mobilize around an issue and advocate with a unified voice for the region. The Committee structure is the primary driver of this capability, with the Governance Committee in particular noted for its effectiveness. This same agility also allowed DDAWNY to become a leader in the COVID response for the IDD field, and recognition of DDAWNY's response led many to suggest that DDAWNY look for other opportunities to mobilize around problem-solving for the sector.

DDAWNY must clearly define its customers and clarify the roles of agencies, families, and individuals.

While there is general agreement that the primary customers of DDAWNY are the member agencies, DDAWNY leadership should determine consistent language to identify customers and stakeholders and how each fits in. This theme also has divergent opinions about how the Family Committee and the self-advocate community fit into DDAWNY. It is necessary to clarify the roles and alignment of each group.

DDAWNY needs to refocus on planning and strategy to maintain its positive positioning.

While DDAWNY has had many successes in the last several years, there is a need to re-focus on planning and being more proactive and strategic in the post-pandemic environment. This includes defining what role DDAWNY wants to play and building an aligned strategy. Equally important, however, is making strategic forecasting and planning an inherent part of DDAWNY's activities, including a well-communicated agenda and goals and considering how to become a thought leader and advocate for systems change.

DDAWNY has an opportunity to leverage the change in Board leadership to increase awareness and engagement.

While Rhonda Fredericks had a significant impact as Chair of DDAWNY, there are also some lingering feelings that it is a People Inc. initiative or primarily associated with People Inc. The change in Board leadership, coupled with the strategic planning process, provides an excellent opportunity for DDAWNY to embark on an education and awareness campaign that gives clarity to the mission and strategic direction and makes clear that it will remain the same viable, visible, and successful organization that it has always been.

There is also a need to build awareness and buy-in within the DDAWNY agencies at the middle management/committee level. Many feel they or their colleagues do not clearly understand DDAWNY's overarching mission, goals, agenda, or initiatives.

Audiences include member agencies, nonmember agencies, local partners and businesses, legislators, and State personnel. Within this theme, many expressed that DDAWNY should consider publicizing its successes and outcomes to member agencies and outside stakeholders.

There are opportunities for DDAWNY to strengthen its committee structure through increased Board interaction, cross-committee collaboration, and communication.

The DDAWNY committee structure is primarily viewed as effective and necessary to DDAWNY's success. Still, many noted the significant number of committees and somewhat siloed approach. Below are some of the consistent themes to improve the committees:



- Review and re-think the purpose and number of committees. Can some be consolidated? Are some no longer needed? Is there a need for any new ones?
- Stronger Board engagement with committees – communicating DDAWNY’s agenda, goals, and what is needed from Committees, and a forum for committees to share issues, activities, and results with the Board.
- Increased cross-committee communication to understand activities, share best practices, identify collaboration opportunities, and ensure alignment.
- More information sharing up, down, across, and outwards - leveraging the website as one forum, including calendars, events, minutes, and outcomes.

DDAWNY needs to play an active role in attracting, educating, and making advocates of the next generation of IDD leaders.

This theme threaded across all assessment audiences and questions. The “silver tsunami” of nonprofit retirements is already beginning in the IDD sector in WNY. The current group of leaders is also a tight-knit group of executives who have been doing this together for decades. There is concern that new leaders coming up or coming in from the outside, some from outside the IDD field altogether, won’t have the same understanding of DDAWNY’s value or commitment to its mission. At the same time, many see the benefit of fresh perspectives and ideas from new leadership. DDAWNY should consider a proactive plan for leadership transition, including education and engagement of up-and-coming leaders and proactive engagement of new CEOs/EDS, as part of its plan to retain existing agencies, attract new ones, and maintain the level of commitment necessary to advance DDAWNY’s mission.

DAAWNY should continue to strengthen its core activities.

It was clear that all stakeholders felt DDAWNY should keep doing what it does best:

- Maintain the reputation of a collaborative, competent, respected entity
- Advocacy and information sharing
- Keep a seat at the tables in Albany/ statewide organizations
- Be knowledgeable subject matter experts
- Collaborate and present a unified voice

Little emerged when asked what DDAWNY should stop doing, other than revisiting the committee structure, suggesting that the current focus areas and activities are the right ones.

DAAWNY has made significant strides in gaining credibility and respect with elected officials and at the state level but has opportunities to ensure continued positive progress.

External stakeholders consistently feel that DDAWNY has elevated its position, credibility, and respect at the state level over the last several years. Bringing the employees to the table vs. the families or executives was seen as a positive by the legislator interviewed. The primary suggestion for advancing that progress was a schedule of legislator meetings throughout the calendar year, not just at budget time, continually reinforcing the issues and challenges with data and facts. It was also suggested that DDAWNY identify a small set of critical issues and stick with them for multiple years. Finally, it was recommended that DDAWNY bring legislators to the agencies, letting them see the work and what cannot be done – and how it impacts their community - because there is no funding.



DDAWNY has many opportunities to consider for its strategic plan. These opportunities must align with the core mission and add to vs. detract from its focus.

In addition to everything noted above, there was a lengthy list of potential opportunities that DDAWNY may want to explore. While most of these were themes, some single recommendations are included for consideration.

- Networking – more opportunities for member agencies to engage, learn, and collaborate
- Assessment of current membership/gaps and increased agency recruitment, especially in the Finger Lakes
- Federal-level advocacy / working with national-level organizations (Anchor)
- NYHER 1115 Waiver Amendment – DDAWNY voice at the table/identify opportunities
- Self-advocate engagement/support – see comments throughout the assessment
- Diversity – understand the biases of being BIPIC/LBTGQIA and having IDD and what needs to be done differently to support
- Technology – how can it be better leveraged/can DDAWNY support agencies (shared services, etc.)
- Caregiving – current focus is on aging; should DDAWNY go after funding focused on IDD
- Intersections with areas outside of IDD, like mental health
- Enhance and use the website as a communication vehicle with up-to-date information on activities, events, outcomes

Strengths, Weaknesses, Opportunities, Threats (SWOT)

The following strengths, weaknesses, opportunities, and threats were identified and prioritized.

Strengths	Weaknesses
Collaboration	Generational change/loss of long-term leaders
Regional focus	Capacity (staff)
Non-competitive within member agencies on strategic issues	Capacity of agency directors
Advocacy	Lack of awareness/visibility
Consensus building	Low participation in Finger Lakes
Convening	Communication – within member organizations/information dissemination
Expertise	Lack of long-term planning/taking a long lens view
Credibility	Agencies competing for the same resources
Information Sharing	
Agility/ability to organize	
Mission Alignment/Synergy	
Committee structure	

Peer support and learning	
Opportunities	Threats
Strengthen core services	Market <ul style="list-style-type: none"> • Labor shortage/skilled worker shortage • Stress on the system from aging/more complex needs • Responsiveness to needs (e.g., people want to be self-directed, but agency funding/finances don't support that) • Competence/Complexity of new employees coming in
Strengthen infrastructure (committee structure, communication, website, processes, etc.)	
Networking and Mentoring for agencies and agency leaders	
Increase focus / refocus on being a thought leader in systems change	Political/Regulatory <ul style="list-style-type: none"> • Rate setting • Federal Policy/impacts of political polarization within and between parties • Cost of regulations • Regulatory bureaucracy and stagnation impede progress
NYHER 1115 Waiver Amendment – DDAWNY voice at the table/identify opportunities (navigator, care management, screener)	
Regional education/convening on emerging topics/opportunities	Industry <ul style="list-style-type: none"> • New leaders coming from different industries • Loss of institutional knowledge across the system • Mergers/Acquisitions – nonprofit, education, healthcare • Cost to membership value of all organizations that nonprofits are in • Unknown 'threat' of managed care
Federal-level advocacy / working with national-level organizations (Anchor)	
Branding, Marketing – strengthen DDAWNY's visibility, communicate outcomes and successes; broader communication of key messages	
Retention/Recruitment– increase membership, particularly in Finger Lakes	Other (technology, etc.) <ul style="list-style-type: none"> • Evolving investment in/new technologies (can be pros and cons) • Social media • Social justice issues (including resulting business changes)
New Service Lines, e.g., technology, transportation, shared services	
Intersections with areas outside of IDD, like mental health	
Increased focus on self-advocacy/ independence	
DDAY	
Clarify DDAWNY's role with families/self-advocates	
Diversity – understand the biases of being BIPIC/LBTGQIA and having IDD, and what needs to be done differently to support	

2024-2026 Strategic Plan

Core Competencies

DDAWNY has identified seven core competencies. Core competencies in italics were identified as competitive differentiators.

Regional Focus – DDAWNY provides a collective regional voice at statewide and federal tables and distills broader issues and information down to regional impacts and opportunities for members.

Synergy – Mission alignment across member agencies creates synergies that make DDAWNY an incubator for collaboration, partnership, and problem-solving.

Systems Thinking – DDAWNY leverages its deep expertise to provide thought leadership and innovation that delivers impactful systems change.

Advocacy – DDAWNY excels at advocating for the needs of regional IDD providers at the local, state, and federal levels.

Consensus Building – DDAWNY is adept at finding areas of common ground and building consensus around positions that benefit the greater good.

Influence – DDAWNY’s statewide relationships and credibility have created pathways for local agencies to gain access and information that would not be available to individual organizations.

Agility - DDAWNY quickly mobilizes and acts on emerging issues and opportunities.

Customer Definition

Developing a framework to describe DDAWNY’s relationship with each constituent was a core need identified for the strategic plan.

Customer Definition: DDAWNY improves the effectiveness and efficiency of IDD provider agencies by providing a forum for cross-agency needs identification and information sharing. These activities inform the education of and advocacy to DDAWNY stakeholders. DDAWNY stakeholders have the influence necessary to take DDAWNY’s messages to the legislative and regulatory bodies that can make changes so that individuals with disabilities receive the highest quality services.

Definition	Primary Customer (Member Agencies)	Stakeholders (Influencers)	Target Audiences (Change Makers)	People Supported (Recipients)
Narrative	Providing a forum for cross-agency needs identification and information sharing, which informs the	education of and advocacy to stakeholders who can take our message to	legislative and regulatory bodies able to make changes so that	individuals with disabilities receive the highest quality services.
Audience	IDD Agencies (including their leadership and staff)	Local Legislators Lobbyists NYDA Other IDD provider associations Businesses/other entities or individuals that can support	Legislative Bodies <ul style="list-style-type: none"> • Assembly, Senate, Governor State Regulatory bodies <ul style="list-style-type: none"> • OPWDD • DOH • NYSED • Other NYS offices Funders	Individuals with IDD and their families (Families and Self-Advocates)
Definition	Agencies that pay to be a part of DDAWNY to directly benefit from the services DDAWNY provides, which in turn strengthens the capacity, infrastructure, and, ultimately, the quality of the services they deliver.	Allies who, if properly aware and educated, are in a position to influence target audiences to make meaningful changes.	Entities that are able to make meaningful changes to policy, funding, services, and processes to enhance the ability of agencies to deliver efficient and effective services to benefit the lives of individuals with IDD and their families.	Those whose lives are ultimately positively impacted by DDAWNY’s efforts to better the overall IDD Agency ecosystem.

DDAWNY Services

DDAWNY's Core Services include:

- Advocacy
- Collaboration and convening
- Information sharing and education
- Collective voice
- Mobilization around Issues
- Expertise and knowledge
- Peer Support
- Peer Learning
- DD Day

Strategic Direction and Priorities

Strategic Direction: By strengthening and leveraging DDAWNY’s unique competencies in advocacy, synergy, systems change, and regional focus, DDAWNY will be the organization of choice for agencies seeking to collectively improve the federal, state, and local IDD ecosystem to positively influence the lives of people with disabilities.

Rationale:

- “Strengthening” addresses the fact that stakeholders and members see DDAWNY as serving this role today and want them to continue to do it. It also addresses that we will do better at what we do best, not branch out into something bigger.
- “Leveraging” addresses the desire of stakeholders and members to use that strength even more effectively to drive needed changes.
- “Regional” addresses the uniqueness of DDAWNY being a regional voice with statewide clout, which stakeholders see as a critical differentiator
- “Ecosystem” addresses the full spectrum of agencies (in and out of DDAWNY), legislative bodies, regulatory bodies, people receiving services, and people who support them.

Strategic Priorities: DDAWNY will do this through the following strategic priorities:

1. Recruiting new and retaining existing members by ensuring DDAWNY clearly communicates and delivers on its value to member organizations.
2. Assessing and strengthening DDAWNY infrastructure and capacity by evaluating and evolving current structures and processes.
3. Focusing on and strengthening core services to maintain and grow its credibility and influence in IDD system evolution.
4. Being a proactive thought leader in evaluating and responding to emerging challenges and opportunities.

12-18 Month Strategic Initiatives

Strategic Priority 1: Recruit new and retain existing members by ensuring DDAWNY clearly communicates and delivers on its value to member organizations.

- **Initiative 1.1:** Grow DDAWNY membership through focused retention and recruitment
- **Initiative 1.2:** Engage and make advocates of the next generation of leaders

Strategic Priority 2: Strengthen infrastructure and capacity by evaluating and evolving current structures and processes.

- **Initiative 2.1:** Evaluate and streamline/enhance the Committee structure and process
- **Initiative 2.2:** Increase Board engagement with Committees
- **Initiative 2.3:** Market DDAWNY's value to the community and stakeholders

Strategic Priority 3: Focus on and strengthen core services to maintain and grow its credibility and influence in the evolution of the IDD system.

- **Initiative 3.1:** Communicate more consistently and effectively with members and stakeholders
- **Initiative 3.2:** Implement a year-round outreach process for legislators
- **Initiative 3.3:** Support DDAY
- **Initiative 3.4:** Establish member networking opportunities

Strategic Priority 4: Be a proactive thought leader in evaluating and responding to emerging challenges and opportunities.

- **Initiative 4.1:** Proactively monitor, assess, and act on environmental changes
- **Initiative 4.2:** Evaluate impacts and opportunities of the Medicaid 1115 NYHER Waiver
- **Initiative 4.3:** Monitor and prepare for conversion to Medicaid Managed Care
- **Initiative 4.4:** Reestablish DDAWNY as a thought leader in systems change

12-18 Month Strategic Initiatives with Actions

Strategic Priority 1: Recruit new and retain existing members by ensuring DDAWNY clearly communicates and delivers on its value to member organizations.

- **Initiative 1.1:** Grow DDAWNY membership through focused retention and recruitment
 - **Actions:**
 - Clean up existing membership lists and establish a maintenance process
 - Identify and reach out to less engaged agencies (understand why, share ways they can engage, share benefits)
 - Develop a process and criteria for managing meeting communications regarding logistics and agendas
 - Develop a “sell sheet” –statistics, successes, benefits of participating
 - Identify agencies not currently in DDAWNY and reach out to them
 - Develop and execute a recruitment plan (dependencies: value prop, clear goals and agenda, documentation of successes)

- **Initiative 1.2:** Engage and make advocates of the next generation of leaders
 - **Actions:**
 - Formalize an onboarding process for new agencies/leaders
 - Establish a work group to identify how to adapt communication/outreach and engagement to appeal to the next generation of leaders
 - Implement new ways of communicating based on workgroup findings
 - Engage executives in more consistent communicating downward within their agencies the value and benefits of DDAWNY, information, etc.
 - Explore a mentoring or partnering program for new or emerging leaders

Strategic Priority 2: Strengthen infrastructure and capacity by evaluating and evolving current structures and processes.

- **Initiative 2.1:** Evaluate and streamline/enhance the Committee Structure and Process
 - **Actions**
 - Clean up existing committee lists and establish a maintenance process
 - Review Committee purpose/functions against the strategic plan for gaps or overlap (are new committees needed, can some go away or be merged?)
 - Evaluate inactive committees and decide how to proceed: reinvigorate, terminate, or merge with another committee
 - Clarify and communicate synergies and boundaries between DDAWNY and Family Committee/Self Advocates
 - Develop a Committees Profile Document (Committee name, Chair, purpose, functions, and members) to be maintained by each Committee Chair
 - Develop and communicate a committee process and expectations (include responsibility for comments on ADMs, when and how to speak on behalf of DDAWNY, and use of DDAWNY logo and voice, etc.)
 - Develop a shared committee calendar



- Explore ways of engaging self-advocate groups across the system and collectively identify needs
- **Initiative 2.2:** Increase Board engagement with Committees
 - **Actions:**
 - Continue the Committee Chair meeting and coordinate timing with Board meetings
 - Discuss the membership meeting – who is invited, how do we engage/encourage attendance, etc.
 - Establish 2-way communication channels and written process (Board meetings, Committee Chair meetings, brief written reports), including Board communicating goals and/or what is needed from the committees
 - Standard Board committee reporting template/process with key items to report to the Board
- **Initiative 2.3:** Market DDAWNY's value to the community and stakeholders
 - **Actions:**
 - Maintain visibility/seat at regional and statewide tables
 - Develop a new logo
 - Define DDAWNY's value proposition and elevator speech
 - Re-vamp the website (with feedback from stakeholders and members)
 - Establish a plan for communicating outcomes and success to the public (ties to 3.1 below)
 - Establish a social media calendar, messages, and policies

Strategic Priority 3: Focus on and strengthen core services to maintain and grow its credibility and influence in the evolution of the IDD system.

- **Initiative 3.1:** Communicate more consistently and effectively with members and stakeholders
 - **Actions:**
 - Clean up the stakeholder list and develop a process for maintaining
 - Communicate the strategy to committees, members, and key stakeholders
 - Establish a process for collecting and documenting outcomes and successes (metrics as well as stories)
 - Establish a routine process and channels for communication of outcomes and successes to committees, agencies, and stakeholders
- **Initiative 3.2:** Implement a year-round outreach process for legislators
 - **Actions:**
 - Get feedback from legislators (clarify points from interviews/ask what they'd like to know more about)
 - Identify target legislators and schedule
 - Define meetings (objectives, data, messages, agencies/Directors involved)
 - Implement schedule
- **Initiative 3.3:** Support DDAY
 - **Actions:**
 - Evaluate existing DDAY purpose, structure, outcomes
 - Get feedback from stakeholders and attendees



- Define the purpose and objectives of future DDAY
- Implement enhancements

- **Initiative 3.4:** Establish member networking opportunities
 - **Actions:**
 - Implement opportunities to network at membership meetings
 - Explore opportunities for informal get-togethers (Happy Hour)
 - Explore a virtual 'event' with current and future leaders, stakeholders

Strategic Priority 4: Be a proactive thought leader in evaluating and responding to emerging challenges and opportunities.

- **Initiative 4.1:** Proactively monitor, assess, and act on environmental changes
 - **Actions:**
 - Make environmental review a standing Board meeting agenda topic
 - Establish member and stakeholder input opportunities throughout the year

- **Initiative 4.2:** Evaluate impacts and opportunities of the Medicaid 1115 NYHER Waiver
 - **Actions:**
 - Review waiver when it is released
 - Provide an overview and implications to members
 - Assign a committee to stay keep tabs on local developments
 - Identify local forums and where DDAWNY should participate
 - Discuss opportunities with the SCN once established
 - Identify opportunities to advocate for disability inclusion

- **Initiative 4.3:** Monitor and prepare for conversion to Medicaid Managed Care
 - **Actions:**
 - Monitor and assess as it evolves

- **Initiative 4.4:** Reestablish DDAWNY as a thought leader in systems change
 - **Actions:**
 - Define a follow-up process to ensure review by the appropriate parties
 - Identify key issues for DDAWNY to develop position papers

Strategic Plan Measures

1. Member retention = x
2. New member growth = x
3. Member satisfaction maintained at x
4. Engagement Measure TBD
5. X touchpoints (or other measure TBD) with legislators annually

Review and Maintenance Plan

Standing Board meeting agenda item