

Instructions for Completing CDA 7001

A detailed project Work Plan is required prior to the release of funds for the Financial Alignment contract and should outline performance goals, measurable outcomes, major objectives, key tasks, and time frames (start and end dates) specific to the project activities outlined in the contract Scope of Work. A minimum of three performance goals is required, however, up to four may be provided.

With CDA approval, Financial Alignment funds may be used to provide “other” project services in addition to those listed in the Scope of Work, as long as they are not duplicative of services provided under other CDA contracts (i.e. HICAP, MIPPA).

The required FA Work Plan categories include:

- Performance Goals - Develop Goals that broadly describe the overall purpose of the project. (i.e., what you want to do, where you want to be).
- Objectives - Objectives are narrow, more specific, identifiable or measureable steps toward a goal. Part of the planning process or sequence (the “how”) to attain the goals.
- Key Tasks - List Key Tasks that must be completed in order to accomplish the stated objectives.
- Staff - Identify the individuals responsible for completing the key tasks, either Contractor Staff (if a AAA Direct HICAP), or Sub-contractor Staff (if a AAA-contracted HICAP).
- Start Date and End Date - Timelines associated with each objective. Specify start and end dates.
- Intended Outcomes- These are the measureable results of the project. Intended outcomes are positive or negative changes, or measureable characteristics that occur as a result of activities.

HEADER SECTION:

Enter the following information:

- Contractor Agency name as it appears on the Standard Agreement (STD 213)
- Date the report is being submitted
- Planning and Service Area (PSA) number (two digits)
- Current Fiscal Year
- Contract Number:
 - Enter either FA or F2
 - Fiscal Year
 - PSA number

STATE OF CALIFORNIA
CALIFORNIA DEPARTMENT OF AGING
FA WORK PLAN TEMPLATE INSTRUCTIONS
CDA 7001i (NEW 11/2017)



CATEGORY SECTION:

Fields will increase in size, down the page, as you type.

Additional Objectives may be added by highlighting the blank row and inserting a row above or below.

Additional Goal's may be added by highlighting Rows: Goal #4, Objectives Row, and Blank Row, Copying, and Pasting below the blank row.

SUBMISSION:

The completed CDA 7001 must be sent as an e-mail attachment to the [CDA HICAP Team Email Address](#): HICAPTeam2@aging.ca.gov and is due by the due date identified in the Program Memo.