

INSTRUCTIONS FOR CDA 7039: ANNUAL ADRC PLAN FORM

Every year, a local Emerging or Designated ADRC partnership outlines goals, objectives, and metrics for how the partnership will provide navigation to services for consumers within the community. Plans outlined in this form will detail goals and activities for the future fiscal year: July 1 of this calendar year through June 30 of the next calendar year.

Please fill out responses on this form and submit to ADRC@aging.ca.gov by April 30.

GENERAL INSTRUCTIONS

Form 7039 components include:

- Pages 1-3: Section I: ADRC Partnership Information
- Page 4: Section II: Barriers and Consumer Unmet Needs
- Pages 5-13: Section III: Annual ADRC Partnership Plan
- Page 14: For State Use Only

Pages 1-3: Section I: ADRC Partnership Information

- Fill out general ADRC information
 - ADRC Name – Fill in ADRC name
 - Fiscal Year – Select the appropriate ADRC fiscal year from the drop-down list.
 - Version – Select “original” if it is the first annual plan submitted for the fiscal year. Select “Revision” and then the number to indicate the revision number if it is subsequent revisions to the plan.
 - Submission Date – Enter the date that the plan form was completed.
- Provide response to Question #1:
 - Enter the organization names of the ADRC Core Partners.
- Provide response to Question #2:
 - Threshold Languages: Please list threshold languages and details in categories of “staff, consumers, and language services.” Additional notes or other information may be added.
 - Threshold Languages are defined as: a language that has been identified as the primary language, as indicated on the Medi-Cal Eligibility Data System (MEDS), 3,000 beneficiaries or five percent of the beneficiary

population, whichever is lower, in an identified geographic area, per Title 9, CCR, Section 1810.410(a)(3).

- Provide response to Question #3:
 - Navigation to Services: Please indicate navigation to services provided in your ADRC partnership area and the name(s) of Core or Extended Partner(s) providing the navigation to that service.
 - LTSS Categories listed are services that ADRC partners may or may not offer navigation to. Check if navigation is provided by a core or extended partner.

Page 4: Section II: Barriers and Consumer Unmet Needs

- Provide response to Question #1:
 - Please list barriers that your ADRC partnership experiences in connecting consumers to services in your area or providing navigation to services through the four ADRC service functions (Enhanced Information and Referral, Options Counseling, Service Coordination, and Transition Services).
- Provide response to Question #2:
 - Please provide unmet needs or gaps in access to services identified in your ADRC service area, and how your ADRC partnership will attempt to resolve those unmet needs through the annual work plan, if able.

Page 5-13: Section III: Annual ADRC Plan

- Provide response to Question #1:
 - Please **specify the ADRC partnership plans or strategies** for each of the nine ADRC categories listed on this form. Plans or strategies are brief descriptions that typically include goals and objectives.
 - Identify the **activities, milestones, measurements, and/or anticipated results** for the upcoming fiscal year for the ADRC partnership. Where applicable, indicate the responsible Core/Extended Partner(s) and specific activities associated with each objective.
 - If needed, additional documentation may be submitted with this annual work plan. For Emerging ADRCs, the development work plan may be referred to and attached.
 - **Category #1: Leadership and Governance** – examples include a local ADRC partnership advisory body, coordination of leadership of the ADRC partnership.

- Category #2: Outreach/Marketing – examples include methods that the ADRC partners utilize to reach consumers, such as outreach events, social media, advertising, website, etc.
- Category #3: Person-Centered Practices – examples include how the ADRC partnership provides navigation to services and supports to consumers in a person-centered way. This can include updates to shared protocols, training, or meetings with staff supporting consumers to assure person-centered practices are implemented.
- Category #4: Standardized Processes and Procedures – example includes additions or updates to shared protocols and processes that ADRC partners utilize when working with consumers.
- Category #5: Quality Review and Improvement – examples include implementation of the statewide ADRC consumer experience survey, follow-up with consumers, and community assessments.
- Category #6: ADRC Service Functions – provide information about how ADRC partners provide access to services through the four main ADRC service functions, with any plans for expansion or updates to provision, if applicable.
- Category #7: Sustainability – examples include how the ADRC partnership blends funding streams to assure sustainability of partnership over the long term, creating or updating a business plan, or adding additional sources of funding.
- Category #8: Training/Staff Competencies – provide information on local ADRC partnership training provided to staff, and plans to train new staff who onboard at an ADRC partner organization.
- Category #9: Information Technology/Security – provide information on how ADRC partners collaborate to assure data is confidential, and what databases are utilized to report data to CDA, and plans to expand capacity in this area, if applicable.

Page 14:

- For State Use Only: Please leave blank. ADRC does not complete this page.



SUBMISSION

The completed Annual ADRC Plan (CDA 7039) must be submitted electronically to ADRC@aging.ca.gov. In the email subject line, please identify the name of your ADRC, Form 7039, and the version. Please Cc all core partners when submitting.

The original plan due date is April 30. Revisions to the plan may be submitted at any time throughout the year.