

Annual ADRC Plans: Guidance for Development

What is the Annual ADRC Plan (CDA 7039)?

The Annual ADRC Plan (CDA 7039) is a shared document for local ADRC partnerships to outline and follow a strategy for assisting consumers in navigating long-term services and supports. The plan updates CDA regarding goals and objectives for each local ADRC. (This document was formerly known as the “program narrative”). The plan aligns with the ADRC Designation Criteria.

The ADRC Service Data Report (CDA 7029) is being updated to avoid duplication of information already submitted via the Annual ADRC Plan. Please stay tuned for a more streamlined version of the report for FY24-25 submissions (first report due October 31, 2024).

What does the Annual ADRC Plan include?

The Annual ADRC Plan should outline goals that a local ADRC partnership plans to achieve during the fiscal year. There are nine categories that align with ADRC activities. Within each category, the partnership outlines a strategy for meeting those goals. Goals should be clearly specified, indicating which organizations, teams, individuals, or departments will be responsible for carrying out tasks. Deliverables should be clear and should include milestones that benchmark progress. The plan, once created, may be updated at any time, annually at a minimum.

When is the Annual ADRC Plan Due?

The Annual ADRC Plan is due April 30 each year. If more time is needed to submit a plan, please reach out to ADRC@aging.ca.gov.

Existing Strategic Plans/Work Plans

ADRC partnerships often have an existing strategic plan or work plan. Those plans may be incorporated into the Annual ADRC Plan. Please attach the existing plan and refer to the sections that should be reviewed in the CDA 7039 form.

How much detail should be included in the Annual ADRC Plan?

Please provide concise information, supplemented by additional documentation such as ADRC Service Data reports or Emerging ADRC Work Plans, as needed.

What happens after the Annual ADRC Plan is submitted?

When an ADRC partnership submits the Annual ADRC Plan to ADRC@aging.ca.gov, the plan is reviewed by CDA’s ADRC Bureau staff who will confirm receipt and follow up with questions, if necessary. CDA reviews plans to ensure appropriate support, training, and technical assistance is being delivered to local ADRC partnerships.