

## **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 the major objectives, key tasks, time frames (start and end dates), and measurable outcomes pursuant to the defined performance goals and the contract Scope of Work.

The required FA Work Plan categories include:

- Performance Goals: CDA has defined the performance goals for FA Work Plans. The performance goals are aligned to the grant activities.
- Objectives: Objectives are narrow, more specific, identifiable, or measurable 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.
- Measurable Outcomes: These are the measurable results of the project. Outcomes are positive or negative changes, or measurable characteristics that occur as a result of activities.

### **HEADER SECTION:**

Enter the following information:

- Contractor Agency name as it appears on the Standard Agreement (STD213)
- Date the report is being submitted
- Planning and Service Area (PSA) number (two digits)
- Current Fiscal Year (Fiscal Year when the contract is executed)
- Contract Number:
  - Enter FA
  - Fiscal Year
  - PSA number
- Amendment Number

### **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.

### **SUBMISSION:**

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