

## INSTRUCTIONS FOR CDA 7039: ANNUAL ADRC PLAN FORM

### General Instructions:

Every year, each 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 upcoming fiscal year (July 1 of this calendar year through June 30 of the next calendar year) and must be submitted to [ADRC@aging.ca.gov](mailto:ADRC@aging.ca.gov) by **April 30**.

Thereafter, each ADRC partnership must submit an **updated** Annual ADRC Plan by **July 31** after completion of the fiscal year to reflect the accomplished activities, milestones, measurements, and/or results for each of the nine ADRC categories in Section III, Parts C, of this form.

This form has replaced the previously required CDA 7060 Program Narrative Closeout Form.

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

### Section I: ADRC Partnership Information

- Fill out general ADRC information
  - ADRC Name – Provide name of the ADRC partnership.
  - Fiscal Year – Enter the appropriate ADRC fiscal year.
  - Version – Enter “original” if it is the first annual plan submitted for the fiscal year. Enter “Revision” and then the number to indicate the revision version.
  - Submission Date – Enter the submission date
- Provide response to Question #1:
  - Enter the organization names of the ADRC Core Partners.

- Provide response to Question #2:
  - Threshold Languages: List threshold languages and provide details under the 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 a 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: List the name(s) of Core or Extended Partner(s) providing the navigation to that service.
  - Note: LTSS Categories listed are services that ADRC partners may or may not offer navigation to.

## **Section II: Barriers and Consumer Unmet Needs**

- Provide response to Question #1:
  - 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). Also, indicate how your ADRC partnership will attempt to resolve these barriers, if able.
- Provide response to Question #2:
  - 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, if able.

## **Section III: Annual ADRC Plan**

For each of the nine ADRC categories, provide the following information:

- **Part A:** Specify the ADRC partnership's plans or strategies including brief descriptions, goals, and objectives.
- **Part B:** Identify the planned activities, milestones, measurements, and/or results for the upcoming fiscal year. Where applicable, indicate the responsible Core and/or Extended Partner(s).
- **Part C:** Specify the accomplished activities, milestones, measurements, and/or results. Part C is submitted via an updated Annual ADRC Plan by July 31 after completion of the fiscal year.

- If needed, additional documentation may be submitted with this annual plan. For Emerging ADRCs, its development work plan may be referred to and attached.
- Nine ADRC categories include:
  - 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 internal quality assurance to ensure person-centered practices are consistently used by staff.
  - 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, community assessments, and other quality assurance processes/methods.
  - Category #6: Service Functions – provide information about how ADRC partners facilitate navigation to services through the four main ADRC service functions (i.e., Enhanced Information and Referral, Options Counseling, Service Coordination, Transition Services) including any plans for expansion or updates, 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 of a business plan, or adding additional sources of funding.
  - Category #8: Training/Staff Competencies – provide information on relevant training provided to staff including onboarding and ongoing training curriculums.
  - Category #9: Information Technology/Security – provide information on how ADRC partners collaborate to share consumer data, reduce duplication of effort, streamline consumer's access to services, and ensure confidentiality of data is maintained. Include information about what databases are utilized to report data to CDA, Application Programming

Interface (APIs) between partner databases, and plans to expand capacity in this area, if applicable.

**Pages 14:**

- For State Use Only: Please leave blank.

**Submission Instructions:**

The completed Annual ADRC Plan (CDA 7039) must be submitted electronically to [ADRC@aging.ca.gov](mailto:ADRC@aging.ca.gov). In the email subject line, identify the name of your ADRC, Form 7039, and the version. Please carbon copy (CC) all core partners when submitting plan to CDA.

The due date of the original plan is April 30. An updated Annual ADRC Plan, specifically Part C of Section III, must be submitted by July 31 to [ADRC@aging.ca.gov](mailto:ADRC@aging.ca.gov) after completion of the fiscal year to reflect the accomplished activities, milestones, measurements, and/or results for each of the nine ADRC categories. In the email subject line, identify the name of your ADRC and Form 7039.

For questions or accessibility assistance with this document, please contact [ADRC@aging.ca.gov](mailto:ADRC@aging.ca.gov).