



Welcome!

ADRC Fridays: Talk, Learn, Connect
April 29, 2022

Meeting Logistics



- Participants will be **muted during presentations**; please **unmute/share video during general discussion times**
- Please use the **chat** feature to post questions and communicate your peers
- **The Live Transcript** is available.
- If dialing by phone, **press *9** to request to be un-muted, **press *6** to un-mute your phone.
- If there are technical issues or questions, please **email**. ADRC@aging.ca.gov and an ADRC Branch staff member will respond.
- **This roundtable is being recorded.**

Poll: Who's Here?

- What type of organization are you a part of:
 - AAA
 - ILC
 - Other ADRC Partner
 - Other Organization servicing LTSS consumers
 - Other
- What sport would you compete in if you were in the Summer Olympics?
 - Swimming
 - Gymnastics
 - Track and field
 - Other
 - I'd rather be watching the Olympics

Today's Topic

- Developing ADRC Leadership and Partnerships: Building a Community Network





Marin Center of Independent Living (CIL)

Julia Hales

Anna Khachatryan

Marin CIL Topics

- Nursing Internship Program
- Local Ombudsman Partnership
- Community Clinics

Marin Center of Independent Living

Questions?



ADRC Partnership Resources


Rosie Carvajal

Image of the ADRC Website

Home | Providers & Partners | Aging & Disability Resource Connection

➤ Aging & Disability Resource Connection

The California Department of Aging (CDA) administers programs that serve older adults, adults with disabilities, family caregivers, and residents in long-term care facilities throughout the State. These services are provided locally by contracted agencies. This webpage is intended for those who provide, or seek to provide, Aging and Disability Resource Connection (ADRC) services.



Introduction to Aging and Disability ...
Introductory video for the Aging & Disability Resource Connection.

[Presentation Slides](#)
[Questions & Answers](#)

For Providers & Partners - ADRC Program Overview
For Consumers - Aging and Disability Resource Connection
For Providers & Partners - Program Narrative and Fact Sheets
NEW - For Public Comment - ADRC Designation Criteria

Service Area Map	Advisory Committee	Data Dashboards	Establishing an ADRC
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ADRC Library	Other Resources		

ADRC Partnership Benefits

The growing number of Californians seeking Long-Term Services and Supports (LTSS) and the desire to develop

ADRC Designation Resources

CDA supports local partnerships in putting together the building blocks of the ADRC model by supplying information and technical assistance. Resources to support your local partnership are provided below.

Path to ADRC Designation – This document outlines the general steps for local partnerships to achieve ADRC Designation.

- ★ **Making the most of ADRC Partnership** - A planning tool for local partnerships to prepare and discuss with partners to pursue ADRC Designation.
- ★ **ADRC Self-Assessment Tool** - This is a self-administered ADRC readiness review intended to indicate the progress toward building the organizational relationships necessary for the success of an ADRC partnership in California. With this tool, core partners can assess their own level of readiness to finalize details necessary to meet the State's ADRC Designation Criteria.

Letter of Interest Template – Interested Partnerships are requested to submit a Letter of Interest to formally express interest in learning about ADRC. Submission of a Letter of Interest will initiate communications and distribution of information bulletins, updates, training opportunities, and announcements from CDA, as available. Letter of Interest may be submitted at any time.

- ★ **ADRC Core Partner MOU Sample** – This is a sample MOU template that can be used by ADRC Core Partners for outlining partnership expectations and facilitating positive local ADRC partnerships.

ADRC Designation Criteria – California's ADRC Designation Criteria are based on the federal Administration on Community Living (ACL) No Wrong Door (ADRC) Key Elements and were developed in collaboration with stakeholders. The ADRC Designation Criteria serve as consistent hallmarks of quality for each ADRC partnership.

Emerging ADRC Evaluation Tool – This tool outlines the criteria for becoming an Emerging ADRC. The criteria focuses on eight baseline measures from the California ADRC Designation Criteria (2021) and are seen as the foundational building blocks in developing ADRC core functions, a person centered philosophy, and a No Wrong Door System to better serve consumers in the community.

ADRC Designation/Re-Designation Process (2019) – CDA has updated its designation/re-designation process effective October 2019 to streamline the designation process for ensuring the integrity of the ADRC Partnership model as described in State statute (WIC 9120) and preparing designated and emerging ADRC partnerships for the ADRC Infrastructure Grants Program (WIC 9121).

ADRC Designation Process Update (2020) – This document describes the process to becoming a Designated ADRC; includes updates to the procedures, tools, and submission deadlines for Interested Partnerships, Emerging ADRCs, and Designated ADRCs; and supersedes the ADRC Designation/Re-Designation Process (2019) document.

ADRC Designation Evaluation Tool – This tool may be used by applicants and the ADRC Designation Review Panel to evaluate whether applications fulfill the identified ADRC Key Indicators for becoming a State-designated ADRC.

Making the Most of ADRC Partnerships



Making the Most of ADRC Partnership Planning

How Do We Prepare?

Each ADRC partnership is unique but there are some predictable planning phases. The tips presented here are simply suggestions to help local Aging and Disability Resource Connection (ADRC) partners streamline the planning and development process. The tips are examples and not requirements for every situation. There may be many other planning methods that could be successful.

The State has eliminated the need for one large narrative application package and has adopted a locally based process that focuses on documented planning activities. This planning guide builds on the ADRC information in these reference documents will provide important background and context to local discussion:

- State ADRC statute WIC § 9120
- California ADRC Designation Criteria (2012)
- ADRC Designation/Re-Designation Evaluation Tool
- ADRC Designation/Re-Designation Process (2019)
- Letter of Intent for State Designation Template
- California Department of Aging Website
[https://www.aging.ca.gov/Providers and Partners/Aging and Disability Resource Connection/](https://www.aging.ca.gov/Providers_and_Partners/Aging_and_Disability_Resource_Connection/)
- Administration on Community Living No Wrong Door Website Resources
<https://nwd.acl.gov/>
- *A Shattered System: Reforming Long-Term Care in California* (2014)
http://www.cicaihss.org/sites/default/files/aginglong_termcarereport.pdf



Review the California Department of Aging's website to find more resources and information about ADRCs and the current activities of the ADRC Advisory Committee. Send a Letter of Intent (use the ADRC Letter of Intent template) to be approved for Emerging ADRC status. Emerging ADRC partnerships receive general ADRC information updates, can attend the State ADRC Advisory Committee meetings via teleconference and may request technical assistance at any time.

ADRC Self-Assessment Tool

ADRC Partnership Self-Assessment Readiness Tool

Instructions: This is a self-administered ADRC Readiness Review intended to indicate the progress toward building the organizational relationships necessary for the success of an ADRC partnership in California. Forming an ADRC partnership and reaching agreements among ADRC core and extended partner organizations about LTSS system improvements takes time. With this tool, core partners can assess their own level of readiness to finalize details necessary to meet the State's ADRC Designation Criteria. Scoring is a self-assigned indication of the progress and the likelihood that ADRC State Designation Criteria could be met within 12 months. Consult the State's ADRC Designation Criteria, the ADRC Designation/Re-Designation Process (2019) and the ADRC Designation/Re-Designation Evaluation Tool for more information about what documentation would be needed to demonstrate a fully functional ADRC partnership.

Assign points for each planning topic item. Point values mean the ADRC partnership has achieved: 0 = No Progress, 1 = Discussion and Planning, 2 = Partial Implementation, 3 = Full Implementation, 4 = Documentation Level of Achievement

ADRC Partnership and LTSS System Planning

#	Readiness Statement	ILC Core Partner Score	AAA Core Partner Score	Other Core Partner as appropriate Score
1	Core partners have together, provided leadership in the local community to find ways to streamline the public's access to public and privately funded LTSS services. Leadership has been collaborative and has taken place over the previous year or more.			
2	Core partners have specific plans for how people in their community could benefit by greater coordination across LTSS organizations, streamlined access to			

SCORING: 0 = NO PROGRESS, 1 = DISCUSSION AND PLANNING, 2 = PARTIAL IMPLEMENTATION, 3 = FULL IMPLEMENTATION, 4 = DOCUMENTATION LEVEL OF ACHIEVEMENT

ADRC Core Partner MOU Sample

|SAMPLE

MEMORANDUM OF UNDERSTANDING

BETWEEN _____

AND _____

AND (AS APPLICABLE) _____

I. Parties

This Memorandum of Understanding (MOU) is made and entered into by and between the _____, the _____ and the (as applicable) _____, hereafter each referred to as an "ADRC Core Partner" and collectively as the "ADRC Core Partnership" for the Aging and Disability Resource Connection (ADRC) of _____.

II. Purpose

This MOU serves to identify a framework for collaboration and partnership to operate in a manner consistent with State of California ADRC designation criteria and to enhance the local ADRC "No Wrong Door System" to better serve residents and communities. This MOU covers, but is not limited to, efforts to improve the consumer experience in navigating available long-term services and support (LTSS) services, and the provision and coordination of the ADRC service functions: Enhanced Information and Referral, Options Counseling, Short Term Service Coordination, and Transition Services. This MOU does not include funding.

III. Background

The State of California has adopted an ADRC partnership model whereby local Area Agencies on Aging (AAA) and Independent Living Centers (ILC) can collaborate, integrate resources, and develop efficiencies that help them respond to increasing consumer service needs and expectations, and higher service demands.


State and local stakeholders developed the ADRC Designation Criteria and ADRC Indicators of Performance to facilitate collaborative system changes

Image of the ADRC website

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Aging & Disability Resource Connection

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General Information

Performance Data Reports

- Who is required: Designated ADRCs
- Frequency: Quarterly
- Due Dates:
 - July 31, 2021 for all activities occurred between July 1, 2020 and June 30, 2021 (cumulative of all four quarters)
 - October 31, 2021 for all activities occurred between July 1, 2021 and September 30, 2021
 - January 31, 2022 for all activities occurred between July 1, 2021 and December 31, 2021 (cumulative of first two quarters)
 - April 30, 2022 for all activities occurred between July 1, 2021 and March 31, 2022 (cumulative of first three quarters)
 - July 31, 2022 for all activities occurred between July 1, 2021 and June 30, 2022 (cumulative of all four quarters)
- Templates/Guidance:
 - Refer to "ADRC Infrastructure Grants Program Data Collection & Reporting" form (CDA 7029) and instructions (CDA 7029i)
 - ADRC Infrastructure Grants Program data must be tracked and reported separately from ADRC CARES Act and ADRC COVID Vaccine Access data.
 - ADRCs are requested to report all services provided by its core and extended partners, regardless if services are funded with ADRC Infrastructure Grants Program funds or not. ADRC partners are encouraged to develop a methodology for completing and submitting accurate data reports to the best of their abilities.
- Training:
 - Webinar recording
 - Presentation Slides
- Submissions: Send to ADRC@aging.ca.gov

Expenditure Reports

- Who is required: Designated and Emerging ADRCs
- Frequency: Monthly
- Due Dates:
 - No later than the last business day of each month for the previous month's expenditures. For example, the October 2020 expenditure report is due to CDA by November 30, 2020 and will capture all expenditures from October 1, 2020 through October 31, 2020.
 - July 31, 2021 for the Final Report of Expenditures (Closeout Report)
- Templates/Guidance:
 - Refer to the "ADRC Infrastructure Grants Program Expenditure Report & Request for Reimbursement" template and instructions.
 - ADRC Infrastructure Grants Program expenditures must be tracked and reported separately from ADRC CARES Act expenditures.
- Submissions: Send to finance@aging.ca.gov

Reporting Templates and Instructions: Choose a document

- Choose a document
- ADRC Infrastructure Grants Program Expenditure Report & Request for Reimbursement (CDA 240)
- ADRC Infrastructure Grants Program Expenditure Report & Request For Reimbursement Instructions (CDA 240i)
- ADRC Infrastructure Grants Program Data Collection & Reporting Form (CDA 7029)
- ADRC Infrastructure Grants Program Data Collection & Reporting Instructions (CDA 7029i)
- Supplement to CDA 7029i
- Sample ADRC Development Work Plans

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Sample ADRC Development Work Plans



Emerging ADRC Development Work Plan Guidance and Sample Template

Updated February 2022

A work plan is intended to help outline your ADRC's vision, organize strategies into action, prioritize goals and objectives, make resourcing decisions, coordinate planning efforts, and communicate your vision and strategies with your planning team and CDA. ADRC partnerships are not required to utilize this sample template and may use their own work plan template if it includes all the components listed in the paragraph below. The design and implementation of your work plan depends on your partnership's preferences and needs.

Good work plans identify what objectives and actions are needed to achieve an expected goal and includes the following components:

- What specific measurable objective needs to be accomplished
- What actions need to be performed to meet objective
- When results need to be achieved
- Who will perform the [action](#)
- What resources will be available
- What is the expected result or outcome from your work to support your [goal](#)

Goal #1: Establish Enhanced Information, Referral and Awareness System

	Objectives	Actions	Timeline or Due Date	Responsible Person/ Agency	Budget/ Resources Allocated	Result, Outcomes/Benchmarks
A	<i>Sample</i>	<ol style="list-style-type: none">1. <i>Identify key action to meet objective</i>2. <i>Identify key action to meet objective</i>3. <i>Etc.</i>	<i>Timeline, due date, or length of time measure</i>	<i>Person responsible</i>	<i>Optional: assigned budget and/or resources</i>	<i>Identify the expected result, outcome, quantifiable measure, or benchmark</i> <i>This column may also be used to document quarterly updates to your planning team and CDA. Add the quarter (i.e. Q1-2022).</i>
1	Develop an Online, Comprehensive, Searchable Database of Information and Service Resources.	1. Assemble a full array of updated and accurate provider information and resources to develop an enhanced				

Partnership Resources

Questions?

Talk, Learn, Connect

What are the easier partnerships to develop, and what are the more difficult partnerships to develop?

What aspects of building partnerships has worked the best or least for you and your team?



Thank you!

- **Consider submitting an ADRC Promising Practice! The extended deadline is Wednesday May 18.**
- Questions or comments:
ADRC@aging.ca.gov

