Emerging ADRC Development Work Plan
Guidance and Sample Template

Sample for online reference – please email ADRC@aging.ca.gov to receive this document in the original Microsoft Word document version.

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	*Sample*	1. *Identify key action to meet objective* 2. *Identify key action to meet objective* 3. *Etc.*	*Timeline, due date, or length of time measure*	*Person responsible*	*Optional: assigned budget and/or resources*	*Identify the expected result, outcome, quantifiable measure, or benchmark* *This column may also be used to document quarterly updates to your planning team and CDA. Add the quarter (i.e.Q1-2022).*

	Objectives	Actions	Timeline or Due Date	Responsible Person/ Agency	Budget/ Resources Allocated	Result, Outcomes/Benchmarks
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 Information and Referral system platform. 2. Design a searchable public website so information and resources are accessible and easy to navigate by consumers.				
2	All Core and Extended Partners support a systematic process to provide information and referral assistance.	1. Develop and implement protocols among ADRC organizations to promote consistency in the delivery of services so that consumers' experience is consistent and predictable. 2. Establish warm transfers to support consumers' navigation through critical pathways for urgent situations and conduct staff training. 3. Develop and implement standardized protocols to follow-up with consumers to				

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		ensure service needs were met and to assess service outcomes.				
3	Engage and inform consumers, caregivers, providers, and stakeholders in the ADRC.	1. Create an annual marketing plan for community outreach and marketing activities to reach consumers about the full range of LTSS options available through the ADRC partners. 2. Develop activities and materials that are shared among partners. 3. Implement strategies to measure their effectiveness and value to the ADRC program. 4. Gather consumer satisfaction data to modify outreach and marketing activities.				

Goal #2: Establish ADRC Options Counseling and Assistance Programs

	Objectives	Actions	Timeline or Due Date	Responsible Person/Agency	Budget/ Resources Allocated	Result, Outcomes/Benchmarks
1	Establish and implement formal standards and protocols that guide Options Counseling.	1. Identify current Option Counseling standards and procedures across Core and Extended partners. 2. Design or adopt Option Counseling standards and establish operational protocols for Options Counseling across core and extended partners. 3. Train staff and implement Options Counseling. 4. Establish follow-up protocols and consumer satisfaction survey processes for quality assurance measures. 5. Measure, evaluate performance and outcomes and make improvements as recommended.				
2	Establish and implement formal standards and protocols that guide Short-Term Service	1. Identify Short-Term Service Coordination standards and procedures across Core and Extended Partners.				

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Coordination in Crisis/Urgent Situations (preventing institutionalization)	2. Design or adopt Short-Term Service Coordination and establish ADRC operational protocols. 3. Train staff on the implementation of Short-Term Service Coordination. 4. Establish follow-up protocols and consumer satisfaction survey processes for quality assurance measures. 5. Measure and evaluate performance and outcomes to make quality improvements.				

Goal #3: Develop Streamlined Eligibility Determination for Public Programs

Objectives	Actions	Timeline or Due Date	Responsible Person/Agency	Budget/ Resources Allocated	Result, Outcomes/Benchmarks
1 Improve access and availability to LTSS with coordinated	1. Coordinate a standardize intake, screening, and assessment protocols of need across all LTSS				

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	process across organizations.	organizations to facilitate consumer access to the ADRC No Wrong Door system.				
2	Develop integrated systems to improve access for consumers across programs and providers.	1. Establish a plan to develop local uniform and universal assessments for LTSS services. 2. Identify and engage other LTSS organizations that can support uniform and universal assessments.				
3	Develop assessment of LTSS service providers and identify potential core service providers.	1. Establish partnerships and protocols with one or more partner organizations that have the capacity to help consumers with personalized assistance to complete their Medi-Cal Financial Eligibility applications.				

Goal #4: Establish Person-Centered Transition Support

	Objectives	Actions	Timeline or Due Date	Responsible Person/Agency	Budget/ Resources Allocated	Result, Outcomes/Benchmarks
1	Establish one or more ADRC Partners to establish formal agreements with critical pathway providers.	1. Identify or develop a partner(s) that can serve as a local contact agency to serve as an MDS 3.0 Section Q responder and serve as the lead organization for Money Follows the Person (MFP)/California Community Transitions (CCT). 2. Establish formal agreements to provide person-centered transition support to local critical pathway providers.				
2	Establish protocols for facility transitions, referral, and staff training.	1. Design or adopt Transition Services standards. 2. Establish ADRC protocols for core and extended partners to refer individuals to ADRC Transition Services. 3. Develop and implement staff training.				

Objectives	Actions	Timeline or Due Date	Responsible Person/Agency	Budget/ Resources Allocated	Result, Outcomes/Benchmarks
	4. Establish training plan and materials for facility administrators and discharge planners about the ADRC role and procedures in supporting their consumers. 5. Create awareness and outreach activities to help identify individuals and their caregivers who may need transition support services. 6. Establish follow-up protocols and consumer satisfaction survey processes for quality assurance measures.				

Goal #5: Secure Involvement of Partnerships, Stakeholders and Consumer Populations in the Local ADRC-NWD System

	Objectives	Actions	Timeline or Due Date	Responsible Person/Agency	Budget/ Resources Allocated	Result, Outcomes/Benchmarks
1	Establish a shared vision of ADRC in the local area.	1. Provide ADRC information to providers, stakeholders and consumer populations and ask for their support. 2. Identify and recruit key leaders to support and guide the development of the local ADRC. 3. Develop a shared local vision of ADRC NWD system. 4. Develop draft work plan for ADRC development and services. 5. Establish process to facilitate regular community meetings to engage local organizations and residents on LTSS topics and trends.				
2	Identifying or forming an Advisory Committee to take on planning tasks and operational or technical issues and	1. Develop a shared vision of the Core Partners for the development of an advisory committee body.				

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	provides recommendations in the development of the ADRC NWD system.	2. Define the committee structure, functions, and duties. 3. Recruit members to provide a broad representation of consumers of LTSS, caregivers, community leaders and providers. 4. Identify resources to support the work of the advisory body in preparing meeting agendas, materials, meeting minutes and other items.				
3	Build a network of LTTS Providers to serve as Extended Partners to the ADRC NWD System.	1. Develop Core Partnership roles, assignments and work plans that will culminate into a written partnership agreement. 2. Conduct a LTSS assessment of local services, along with their strengths and weaknesses. 3. Identify, recommend, and engage LTSS				

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	organizations to become viable partners and support the services of the ADRC NWD system. 4. Develop ADRC Extended Partner agreements to support program service protocols, training and cross-training plans, service entry points, consumer information and data reporting requirements.				

Goal #6: Implement Quality Assurance and Continuous Quality Improvement Practices

Objectives	Actions	Timeline or Due Date	Responsible Person/Agency	Budget/ Resources Allocated	Result, Outcomes/Benchmarks
1 Develop and implement a sustainability plan to sustain ADRC core services in the future.	1. Identify, secure, and leverage current funding streams to support core services. 2. Identify potential new funding sources and develop key actions to				

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		secure and leverage funding. 3. Assess how current and new services and functions can be incorporated in your program to leverage funding such as Medicaid Administrative Claiming (ADRC MAC).				
2	Build capacity and improve staff expertise to serve older adults and people with disabilities.	1. Identify and develop agency staffing to improve ADRC core services and administrative functions. 2. Create staff training plan, resources, and procedures to maintain and build staff expertise.				
3	Establish and meet shared data management and protection protocols that comply with HIPAA, ADA, and Section 508 of the Rehabilitation Act.	1. Develop system and protocols to share consumer information that supports consumer's privacy and complies with state and federal laws.				

	Objectives	Actions	Timeline or Due Date	Responsible Person/Agency	Budget/ Resources Allocated	Result, Outcomes/Benchmarks
4	Expand IT/MIS supports in all program functions.	1. Identify, develop, and implement technology solutions to improve warm transfers, consumer and data tracking and performance measurement.				
5	Incorporate continuous quality improvement plans and procedures.	1. Develop systems to gather and analyze performance measures such as consumer satisfaction, referral pathways, service outcomes and program and administrative operations. 2. Establish standards for success.				
6	Build a performance tracking and trending system among ADRC core service partners.	1. Establish procedures to collect and report service activities and information. 2. Establish methods of evaluation to monitor program success, consumer outcomes, and increasing access to information and services.				

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