ANNUAL REPORT

The Welfare and Institutions Code (WIC) Section 5604.2 describes one of the duties of the local mental health board to “Submit and annual report to the governing body on the needs and performance of the county’s mental health system.”

This report is from the Board about the local mental health system, and it is the board’s responsibility to assure that it is completed annually. The statute does not say what needs to be included in the report. Every board has a member of the local governing board, the County Board of Supervisors, on their board and it is appropriate to discuss the content of the annual report and the expectations of the Board of Supervisors with that designated representative. The format of the report will depend on the content of the report.

Each Board has its own culture, and this is one way to express that culture. The Board may address this the content of the annual report in several different ways:

- If the Board has an action/strategic plan, it may wish to report back on that plan.
- If the Board has completed the Data Notebook for the CA Behavioral Health Planning Council for the year, it may wish to use that report as the annual report.
- If the Board has worked on a certain area of focus, a ”hot topic”, it may wish to use a review of that work as the annual report.
- If the Board has several standing or temporary/ad hoc committees working on different issues/topics, committee reports may be submitted as the annual report.
- The Board may wish to review its meeting agendas/minutes and compile a list of decisions and activities as the annual report.

The format of the report will depend on the content of the report. The report should be as concise as possible.

- Keep in mind that the primary audience is the Board of Supervisors.
- If it is a long report, consider summarizing the content into one page as an “Executive Summary”.
- Number the pages so that anyone reading the report can refer to them easily; provide a table of contents if the report is lengthy.
- Provide graphics or pictures if they help express the content of the board.

The report may be assigned to a standing or temporary/ad hoc committee for completion and returned to the Board for approval upon completion.

The Board will send the annual report to the Board of Supervisors for their review. It is important that it be available to the public and stakeholders as well.

- Post the Annual Report on the website of the Board.
- Distribute copies of the Annual Report to collaborative partners including NAMI, service providers, the CA Behavioral Health Planning Council, the CA Association of Local Behavioral Health Boards and Commissions, and others.
• Send the Annual Report to the Board of Supervisors
• To increase your visibility, consider asking the Board of Supervisors to agendize a presentation on the Annual Report:
  o Introduce the members of the Board who are attending the meeting
  o Present a synopsis of the Annual Report
  o Assure that copies of the material being discussed are available to the public to comply with the Brown Act; you may refer to a posting on a website or you may have a one-page handout for the entire audience
RESPONSIBILITY:
Submit an annual report to the governing board on the needs and performance of the county's mental health system.

OBJECTIVE:
Develop an annual report to submit to the Board of Supervisors on _____.

<table>
<thead>
<tr>
<th>Activity: Identify the tasks that need to be completed to reach the objective.</th>
<th>Who:</th>
<th>When:</th>
<th>Notes: What else do we need to know to complete this task?</th>
</tr>
</thead>
</table>
| 1. Discuss the contents of the Annual Report.  
  - There are no requirements outlined in the regulations about the contents of the Annual Report.  
  - Consider using the information from the Data Notebook as the basis for the Annual Report.  
  - Consider using the Action Plan as the basis for the Annual Report. | Board | Annual Meeting | Representative from the Board of Supervisors; Director of local mental health dept. including substance use if appropriate. |
| 2. Select a temporary/ad hoc committee to oversee the development of the Annual Report. | Board | Annual Meeting |
| 3. Meet to discuss completion of the Annual Report:  
  - Establish the submission date and schedule other activities accordingly  
  - Seek support as needed from the Director of the local mental health plan  
  - Seek support as needed from the representative of the Board of Supervisors  
  - Establish outline of Annual Report and assign responsibilities for writing.  
  - If the document is lengthy, consider preparing an Executive Summary of the material. | Temporary/Ad hoc Committee | As scheduled | Director of local mental health/substance use program; Representative of the Board of Supervisors; Other agency staff as needed/appropriate |
<p>| 4. Complete the Annual Report, and present to the local board for approval and discussion of presentation of the Annual Report to the Board of Supervisors. | Temporary/Ad hoc Committee | As scheduled |</p>
<table>
<thead>
<tr>
<th>Appropriate/Agency staff as needed</th>
<th>As scheduled</th>
<th>Board</th>
</tr>
</thead>
</table>

5. Present the Annual Report to the Board of Supervisors:
- Consider verbal presentation on BOS agenda as many board members present as possible.
- Consider using a Power Point presentation.
- Consider having more than one member of the Board make the presentation.
- Remember to bring copies of the document for members of the public attending the meeting.

6. Present the Annual Report to other Organizations as Appropriate:
- Behavioral Health Boards/Commissions
  - Consider sending a copy of the report to the CA Association of Local Post the Annual Report onwebsite of the local board
  - Send copies of Annual Report to other Organizations.

- Appropriate as needed.