



**California Association of Local Behavioral Health
Boards and Commissions**

Annual Report 2016-2017

First incorporated in 1993, CALBHB/C is a 501(c)(3) non-profit public benefit corporation. It exists to provide coordination, consultation, technical assistance, training and advocacy to the 58 county Mental/Behavioral Health Boards and Commissions (MHB/BHBs) and to the MHB/BHBs of the City of Berkeley and the Tri Cities (La Verne, Claremont and Pomona). Association activities are funded by annual dues from the constituent MHB/BHBs and from funds provided by the Mental Health Services Oversight and Accountability Commission.

Executive Summary

This has been a year of change for the California Association of Local Behavioral Health Boards and Commissions (“The Association”) in which it adopted new [bylaws](#), revitalized its internal structure and recommitted to effective service to its members.

- 1) Administrative and financial oversight
 - Institution of effective administrative policies and procedures
 - Performance of an internal financial audit
 - Implementation of QuickBooks for financials; engagement of an accounting firm
 - Development of a budget and budgeting procedures
 - Initiation of additional fund-sourcing efforts
 - Improvements to existing bylaws, rendering the organization more strategic
- 2) Mental Health Board (MHB) training and support for MHB/BHBs
 - Increased resources provided through website, social media and quarterly newsletters
 - Reorganization of regional coordination teams
 - Increased number of regional events, with professional training and speakers
 - Increased number of participants to trainings/meetings
 - Commitment to visiting individual MHB/BHBs
- 3) Statewide advocacy for needs identified by MHB/BHBs
 - Initiation of “Listening Sessions”, geared toward understanding mental health issues affecting consumers, family members and local communities.
 - Initiation of issue-based ad hoc committees to study and create issue briefs and recommendations regarding mental/behavioral health-related issues.
 - Increased communication and collaboration with other statewide organizations, including the California Mental Health Planning Council, the California Behavioral Health Directors Association, Mental Health Services Oversight and Accountability Commission, and others.

During the year, the Association contracted with consultant Steven Dambeck to provide guidance toward desired change and growth of the organization. The following pages contain Mr. Dambeck’s final report, providing a detailed narrative of the changes brought about during 2016-2017.



**California Association of Local Behavioral Health
Boards and Commissions**

Final Report
to the
**California Association of Local Behavioral
Health Boards and Commissions**
by
Steven Dambeck

July 15, 2017

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1.0 Background

1.1 The Concept

This five-month engagement was contracted by the CALBHB/C Executive Team to coordinate implementation of the Strategic Action Plans, which were formulated during the quarterly meeting in San Diego in January 2017, with the goal of providing the structure and processes necessary to restore the confidence of internal and external stakeholders in the work being performed by the Association.

The consultant for this engagement, Steven Dambeck, was selected because he had driven the development of the Action Plans (while under contract with the California Mental Health Planning Council) at the San Diego sessions.

He submitted written monthly status reports (found in Appendix A) and provided verbal status reports during two Executive Committee conference calls and at the Annual Meeting.

1.2 The Scope of Work

The Scope of Work of this contract contained a number of deliverables meant to support implementation of key Action Plan initiatives:

- A) Financial Team: Work with the Association to establish a Financial Team and guide that team to design and implement protocols to provide accurate and timely payments, records and reports; also to guide the team to develop the framework for an annual budget and to build a funding plan to meet that budget.

 - B) Bylaws, Policies & Procedures: Review and update Bylaws and Policies and Procedures to provide the structure upon which the Association can effectively accomplish its 2016-18 Action Plan.

 - C) Regional Coordination: Develop a Team of Regional Coordinators
 - a. Develop and Execute Plan: Create job description; define individual and regional goals; craft MHB assessment worksheet; write communication plan; develop regional meeting schedule and organizational principles and checklist.
 - b. Identify and Recruit Qualified Regional Coordinators
 - c. Study the appropriateness of making the role of Regional Coordinators a contracted position and, if approved to move forward, to develop a hiring and training plan for contracted Regional Coordinators.

 - D) Training Plan: Develop a training plan to provide on-going training to local Mental Health Boards and Commissions and work with potential funding entities to provide the training.
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The status of each of the Action Plan initiatives driven by these contract deliverables, as of 7/15/17 can be found in Appendix C.

2.0 Financial Team

The most pressing financial objective was to restore the confidence of the primary funding entity of the Association (the Mental Health Services Oversight and Accountability Commission or MHSOAC), which had expressed its concern over the Association's performance and financial accountability.

2.1 Implementing Professional Protocols

The consultant worked with the Executive Team to oversee the compilation of the financial records, the hiring of a financial controller, the completion of an internal audit, and the subsequent recommendations for the provision of accurate and transparent financial procedures. Together with the Financial Controller and Association Secretary, the consultant formulated a series of procedures for reimbursement and expense tracking, and presented them to the MHSOAC for review and approval. This financial team also worked together to acquire QuickBooks accounting software and to contract with an outside firm to perform bookkeeping tasks.

The consultant also worked with the Association Secretary to review policies and procedures for recording and reporting meetings. These recommended policies and procedures were also presented to MHSOAC for comment and approval.

2.2 Formulating a Budget

With oversight from the Executive Team, the FY2017-2018 budget was considered, with careful attention to probable (but not secured) income sources, to include:

- 1) Renewed MHSOAC funding
- 2) Provision of training by the California Institute for Behavioral Health Solutions (CIBHS), under contract with the Department of Health Care Services (DHCS), to include travel expense reimbursement for MHB/BHB members at CALBHB/C quarterly and regional meetings
- 3) Adjusted MHB/BHB dues income

Expenses were conceived as falling into three categories: operational expenses, meetings and staff. Modest operational expenses were calculated from previous fiscal year records.

Meeting expenses were calculated from:

- 1) Previous records
- 2) Anticipated increased statewide outreach by Association leadership
- 3) Input by regional teams on the expenses needed to meet expanded self-imposed regional tasks (see 4.1, below).

Staff expenses were calculated based on negotiations with the bookkeeping company noted in 2.1, and on the consistently expressed wish for an Executive Director.

The draft budget was provided to the Executive Team, and input was solicited from a number of individual directors. The proposed budget was reviewed by the Financial Controller at the Annual Meeting, and was approved by the Governing Board on June 15.

2.3 Sourcing Funding

The consultant worked actively with MHSOAC to restore their confidence in CALBHB/C and to approve a one-year extension of the contract; this was accomplished in June. The slightly revised extension contract is pending. He also worked with the Financial Team to rework the existing fee structure, arriving on a modest, population-based increase in annual dues, which was approved along with the budget at the Annual Meeting.

He worked continually to engage with DHCS and CIBHS to encourage the training contract to go through. He also sounded out a number of potential partners for additional funding opportunities, working closely throughout with the Association's Financial Controller and Secretary. He encourages the Association to continue pursuing these avenues for funding.

3.0 Bylaws and Policies & Procedures

3.1 Making the Organization More Effective

During sessions in San Diego in January, it was acknowledged that current bylaws regarding nomination and election were not being followed consistently, and also that the nomination/election process as practiced, was not resulting in effective and dedicated Board membership. It also became clear that the existing 25-director/5-officer structure was not well designed for strategic decision-making and action.

It was determined to focus on those portions of the existing bylaws relating to board/officer composition and the nomination/election process. The consultant convened an ad hoc bylaws team to review and make recommendations. These recommendations were presented to the Executive Team and subsequently brought in draft form to the quarterly meeting in Redding in April.

In Redding, two ad hoc teams worked to refine aspects of the proposed bylaws changes. These proposed changes were brought to a vote by the Board, and sent out to all constituent mental health boards for review 30 days after the April Regional Meeting in Redding. The new bylaws were approved at the Annual Meeting in June.

3.2 Suggestions Going Forward

The changes made to the bylaws provided the structure to make the Governing Board more nimble and strategically oriented. More work needs to be done to normalize the nomination and election processes. Key questions that need to be addressed are:

- 1) Should all votes be cast electronically in the future?
- 2) What is the appropriate composition of the nominating committee for both directorship and officers?

It is also recommended to increase the Executive Committee with an additional two “members-at-large”. Under the leadership of the Executive Committee, an ad hoc committee should be formed to review the Bylaws and draft appropriate Policies and Procedures.

With oversight from the current Executive Committee, the following policies have been drafted. (They are still under discussion by the Executive Committee, followed by review and possible approval by the Governing Board.)

1. Ad Hoc Team Policy
2. Travel Expense Reimbursement Policy
3. Financial Policy (Board & Staff Roles)

4.0 Regional Coordinators

Rapid progress on stabilizing the organization and restoring its credibility was essential, but did not address the fundamental question of how the Association was to serve its mission of “supporting the work of local mental and behavioral health boards and commissions”.

In San Diego, it was determined that this mission was best served by engaging, on the ground, with each and every local board. To accomplish this, it was determined to thoroughly rework the concept of regional coordination.

4.1 *Developing principles*

In San Diego, the door was opened to whatever structure was best suited to providing effective service to all local boards, including paying for regional coordination services. The consultant was tasked with helping the membership decide what structure(s) should be adopted.

The approach taken was to work intensely, region by region. The consultant convened team meetings in the Superior, Bay Area, Central and South regions. Los Angeles was invited to participate in the South regional meeting. He brought with him a “strawman” job description and statement of regional goals and asked each region to challenge and amend it. At each subsequent regional meeting, he presented the work of previous regions. By mid-May, Regional Support and Training Guidelines were published (see Appendix B), with descriptions of regional coordination responsibilities and prescribed comportment *vis a vis* local boards, as well as guidelines for organizing regional meetings.

Although the discussion in San Diego pointed toward creation of an “assessment” worksheet to be used at each local board visit, the consensus among regional team members was to be wary of this approach, lest the local boards feel threatened by Association “oversight”. The South region is still discussing its feelings about this, aware of the risks involved, but wanting to balance that with a wish to normalize observation of local boards in an attempt to more effectively serve them.

Using these principles as the foundation, each regional team was tasked with determining how to actualize them. In the Superior Region, for example, it was determined that the three elected directors would divide the region between them, and take responsibility (with support from volunteers) for visiting and developing rapport with each local board in their area. The Bay Area preferred to go in tandem to each local board in the region. Central and South are still in the process of determining their approach.

As each regional team determined its approach to serving all of its local boards, it calculated an annual travel budget, which was incorporated in the annual budget approved in June (2.2, above).

4.2 Recruiting and Engaging Regional Team Members

The consultant took the lead role in identifying potential regional team members. He began with the three elected directors in each region, and also approached out-going directors as well as local board members who aspire to greater service. He visited a number of local boards to engage with members and to sound them out for a willingness to serve and to gently invite them to consider such service in the future.

The operating principles for assessing candidates for regional teamwork were: 1) an ability to patiently build trust by eschewing expressions of self-importance; 2) an ability to listen; 3) diplomatic capacity; 4) an ability to travel and flexibility in the hours of travel. Experience and knowledge in the behavioral health arena are, of course, valuable assets, but can be net negatives if not coupled with a deep wish, and capacity, to effectively *serve*.

4.3 Assessing the Viability of Hiring Regional Coordinators

During discussions with each of the regional teams, budgets were developed by the teams to pay for travel among and between MHB/BHBs. In each of the regional team meetings the question of a paid coordinator was brought up, and in no case was it found to be of interest. There was, and continues to be, an enthusiasm for active teamwork in serving the MHB/BHBs, and an appreciation for how such direct connection “on the ground” will help each Association director remain sensitive to MHB/BHB concerns and issues.

The idea of contracting a regional coordinator may at some point be revisited, especially in the Central Region due to the large number of MHB/BHBs and the large distance spanning the region.

5.0 Training Plan

The most essential support that the Association can offer to local boards is to ensure that they have the tools they need to perform their mandated tasks. This means sufficient training on the meaning and effective approaches to WIC 5604.2 requirements, as well as on any other leadership, assessment, reporting or advocacy skills that might be needed

5.1 Training offered

Training was very active during the five months of the contract. The consultant personally visited 24 MHB/BHBs during this period and encouraged visits by other Association members. This level of personal engagement contributed to increased attendance at regional trainings (more than double the total attendance during the equivalent period in FY 2016).

Date	Location	Attendees
April 2017	Redding	31
April 2017	San Jose	19
May 2017	Sacramento	22
June 2017	Irvine	48
Total	4	120

The training in all cases was presented by Susan Morris Wilson, past trainer for CIBHS and current president of CMHPC. The consultant helped organize, and was present at, each event.

5.2 Sourcing Training Funding

Working closely with the Executive Director and President of CMHPC, the consultant, along with the Association Financial Controller, created a training plan for FY 2018, which has been submitted to DHCS for inclusion in its contractual talks with CIBHS.

6.0 Appendix A: Status Reports

February –March Activities

1 Major Activities 2/15 – 3/14

Steps forward on the four contractual tasks:

1. Financial Team: “Work with the Association to establish a Financial Team and guide that team to design and implement protocols to provide accurate and timely payments, records and reports; also to guide the team to develop the framework for an annual budget and to build a funding plan to meet that budget.”
 - Brought the work done by Theresa, Carole and Leslie to MHSOAC, to get feedback on the internal audit and proposed procedures going forward
 - Discussed funding options with Jane Adcock
2. Bylaws, Policies & Procedures: “Review and Update Bylaws and Policies & Procedures to provide the structure upon which The Association can effectively accomplish its “2016-18 Action Plan”
 - Interviewed external stakeholders about suggestions, researched best practices and developed a list of foundational concepts upon which to build the revised bylaws
 - Worked with Duane to schedule a work session with the bylaws review team (March 18th).
3. Regional Coordinators: “Develop a Team of Regional Coordinators & Execute Plan: Create job description; define individual and regional goals; craft MHB assessment worksheet; write communication plan; develop regional meeting schedule and organizational principles and checklist; Identify and Recruit Qualified Regional Coordinators; Study the appropriateness of making the role of Regional Coordinators a contracted position and, if approved to move forward, to develop a hiring and training plan for contracted Regional Coordinators.”
 - Developed concepts for role of regional coordinator, to present first to bylaws review team
 - Superior Region:
 - Worked with Leslie and Mae to refine the Redding meeting in April
 - Met Leslie and her team (Mae, Leon, Kate) in Redding to discuss the RC role and to make a presentation at the Shasta Co. MHB meeting
 - Met Butte County MH director to discuss Association rapport with directors
 - South Region:
 - Scheduled visit to Los Angeles and Kern County MHB meetings
 - Scheduled to meet with South regional leadership (on-going)
 - Bay Area Region:
 - Met Napa County MH director to discuss Association rapport with directors and possibility of pushing local projects
 - Los Angeles Region:
 - Scheduled to meet with LA MHB chair
 - Central Region:
 - Scheduled visit to Sutter-Yuba

1 Major Activities 2/15 – 3/14

4. Training Plan: Develop a training plan to provide on-going training to local Mental Health Boards and Commissions and work with potential funding entities to provide the training.
- Met with Susan Wilson to discuss strategies for getting funding and providing training
 - Met with Jane Adcock to review request letter for CIBHS funding

March-April Activities

1 Major Activities 3/15 – 4/14

Steps forward on the four contractual tasks:

5. Financial Team: “Work with the Association to establish a Financial Team and guide that team to design and implement protocols to provide accurate and timely payments, records and reports; also to guide the team to develop the framework for an annual budget and to build a funding plan to meet that budget.”
- Continued to update MHSOAC on financial procedural improvements and to encourage them to give us a “clean bill of health”
 - Met with CBHDA and CMHPC representatives to develop CALBHBC role and financial possibilities
6. Bylaws, Policies & Procedures: “Review and Update Bylaws and Policies & Procedures to provide the structure upon which The Association can effectively accomplish its “2016-18 Action Plan”
- Met with bylaws review team and draft bylaws recommendations
 - Presented bylaws recommendations to the Executive Team
 - Refined bylaws draft at work-sessions at the Redding Quarterly meeting
 - Guided Board acceptance of new bylaws
7. Regional Coordinators: “Develop a Team of Regional Coordinators & Execute Plan: Create job description; define individual and regional goals; craft MHB assessment worksheet; write communication plan; develop regional meeting schedule and organizational principles and checklist; Identify and Recruit Qualified Regional Coordinators; Study the appropriateness of making the role of Regional Coordinators a contracted position and, if approved to move forward, to develop a hiring and training plan for contracted Regional Coordinators.”
- Guided acceptance of regional team concept, with enhanced regional role for all directors
 - Designed election procedures, to adhere to current bylaws while moving toward the new ones
 - Facilitated coordination of regional meeting, and director voting in Superior region
 - Working with new Superior directors to develop team strategies
 - Attended Sacramento, Glenn Kern county MHB meetings
 - Attended LA meeting and met with leadership there to encourage LA to re-engage in CALBHBC

1 Major Activities 3/15 – 4/14

Training Plan: Develop a training plan to provide on-going training to local Mental Health Boards and Commissions and work with potential funding entities to provide the training.

- Met again with Jane Adcock to review request letter for CIBHS funding
- Organized training for Central, South and Bay Area regional meetings

April - May Activities

1 Major Activities 4/15 – 5/14

Steps forward on the four contractual tasks:

8. Financial Team: “Work with the Association to establish a Financial Team and guide that team to design and implement protocols to provide accurate and timely payments, records and reports; also to guide the team to develop the framework for an annual budget and to build a funding plan to meet that budget.”
 - Continued to update MHSOAC on financial procedural improvements and to encourage them to give us a “clean bill of health”
 - Continued to work with CMHPC to develop a training program with CIBHS
 - Began research on alternative funding sources
9. Bylaws, Policies & Procedures: “Review and Update Bylaws and Policies & Procedures to provide the structure upon which The Association can effectively accomplish its “2016-18 Action Plan”
 - Worked within current bylaw directives, while moving toward new bylaw requirements, to facilitate voting for directors, and candidates for executive roles
10. Regional Coordinators: “Develop a Team of Regional Coordinators & Execute Plan: Create job description; define individual and regional goals; craft MHB assessment worksheet; write communication plan; develop regional meeting schedule and organizational principles and checklist; Identify and Recruit Qualified Regional Coordinators; Study the appropriateness of making the role of Regional Coordinators a contracted position and, if approved to move forward, to develop a hiring and training plan for contracted Regional Coordinators.”

Superior Region:

 - Continued to monitor team development; visited Nevada County MHB

Central:

 - Recruited director candidates and helped organize upcoming regional meeting in Sacramento; released on-line voting; visited Sutter-Yuba MHB

South Region:

 - Recruited director candidates and established on-line voting process; released on-line voting

Bay Area Region:

1 Major Activities 4/15 – 5/14

- Met with regional directors to develop standards and policies for regional teamwork
Los Angeles Region:
- Worked with them to finalize slate of directors

Training Plan: Develop a training plan to provide on-going training to local Mental Health Boards and Commissions and work with potential funding entities to provide the training.

- Continued to press gently on CIBHS funding

May - June Activities

1 Major Activities 5/15 – 6/15

Steps forward on the four contractual tasks:

11. Financial Team: “Work with the Association to establish a Financial Team and guide that team to design and implement protocols to provide accurate and timely payments, records and reports; also to guide the team to develop the framework for an annual budget and to build a funding plan to meet that budget.”
 - Worked with Financial Controller and Executive team to develop annual budget
 - Worked with Financial Controller and Executive team to revise fee structure
 - Continued to pursue DHCS funding for CIBHS training
 - Continued research on alternative funding sources with Tom Campbell
12. Bylaws, Policies & Procedures: “Review and Update Bylaws and Policies & Procedures to provide the structure upon which The Association can effectively accomplish its “2016-18 Action Plan”
 - Bylaws passed at annual meeting
13. Regional Coordinators: “Develop a Team of Regional Coordinators & Execute Plan: Create job description; define individual and regional goals; craft MHB assessment worksheet; write communication plan; develop regional meeting schedule and organizational principles and checklist; Identify and Recruit Qualified Regional Coordinators; Study the appropriateness of making the role of Regional Coordinators a contracted position and, if approved to move forward, to develop a hiring and training plan for contracted Regional Coordinators.”
 - Presented Association policies and standards for regional teamwork at annual meeting

Coordination Teams:

Superior Region:

- Continued to monitor team development

Central:

- Helped facilitate regional meeting in Sacramento

1 Major Activities 5/15 – 6/15

- Attended Sutter-Yuba and El Dorado MHB meetings

South Region and Los Angeles:

- Helped facilitate regional meeting in Irvine
- Organized trip to Imperial County MHB meeting

Training Plan: Develop a training plan to provide on-going training to local Mental Health Boards and Commissions and work with potential funding entities to provide the training.

- Continued to press gently on CIBHS funding

7.0 Appendix B: Regional Coordination Guidelines



California Association of Local Behavioral Health
Boards and Commissions

Regional Coordination Guidelines

Director Responsibilities in the Region

CALBHB/C Directors act locally, while thinking and advocating on a statewide level.

The three Directors in each region have joint responsibility for providing support to each local mental/behavioral health board or commission (MHB) in their jurisdiction. This support takes the form of:

- Ensuring that each MHB in the region is visited at least once annually.
- Providing updates on statewide issues and policy changes.
- Providing information regarding CALBHB/C's mission, resources, regional meeting and training offerings.
- Responding to inquiries from local MHBs in a timely manner.
- Noting any local need that can be elevated to a regional, and subsequently State level.
- Encouraging networking and mutual support between MHBs having similar issues and initiatives.
- Providing meaningful quarterly reports to the CALBHB/C Board.

Principles of Comportment

The Director is a representative of CALBHB/C. CALBHB/C provides support as requested by MHBs, and on terms suitable to the MHB. Thus, the attitude of the Director is always to *offer* rather than to insist, to *listen* rather than to tell, and to emanate patient support.

The building of trust is the first priority, and it must be continually strengthened. Directors are encouraged to interact with MHBs in a spirit of appreciation for the work they are doing, and affection towards their good will and pure aspirations. Directors are encouraged to listen attentively to the MHB's own perception of its needs and direction, and to avoid imposing their own sense of what the board should want and how it should change.

A budget estimate for travel and regional team meetings is to be submitted annually. Directors are responsible for maintaining expenses within the CALBHB/C approved annual budget.

Regional Organization

Each region is responsible for determining its own structure for providing these services. All three directors may be active in reaching out to MHBs, or they may decide to delegate that responsibility to only one or two of the directors; or – alternatively – to engage a broader team of regional helpers to perform this work.

Note that the Los Angeles Region acts in concert with the Southern Region and shares its Regional Meeting.

8.0 Appendix C: Action Plan Implementation Summary

ORGANIZATIONAL SUSTAINABILITY

Strategic Objective	Action Steps	Status
Establish central office and hire staff	Establish an office in Susanville, with necessary equipment and supplies Locate and contract with administrative support staff	Complete 2/15/17 Complete 6/5/17
Assure 501-c 3 requirements are met, Regarding meeting minutes and reports	Establish and follow appropriate procedures	Complete 2/15/17
Work collaboratively with statewide partners	Establish and strengthen rapport and communication protocols with: California Behavioral Health Directors Association, CMHPC, MHSOAC, Steinberg Institute, et al.	Begun, ongoing
Develop annual budget	Assess priorities and optimize available resources	Complete 6/15/17
Research and secure funding	Locate potential funding organizations and grants Evaluate benefits of adjusting the member fee structure	Begun, ongoing Done 6/15/17
Review and update bylaws and policies and procedures	Adjust bylaws to strengthen both the strategic capacity of the organization and its serviceability to LMHBs	Bylaws complete 6/15/17 P & P: ongoing

PUBLICATIONS

Strategic Objective	Action Steps	Status
Website	New, compelling website, to become the go-to information resource for LMHB members, featuring calendar items, discussion of issues, links to resources, library of Association documents, etc.	Complete 2/17/17
Newsletter	New, compelling newsletters to be released via MailChimp on the first week of January, April, July and October, featuring calendar items, statewide news and local board reminders & updates	Complete 2/17/17
Social Media	Active Facebook postings and monitoring	Active 2/17/17

STATEWIDE ADVOCACY

Strategic Objective	Action Steps	Status
Influence policy on county and state levels	Work with partners to develop advocacy strategies	Begun with CMHPC and CBHDA; ongoing

REGIONAL COORDINATORS

Strategic Objective	Action Steps	Status
Define and Develop Role of Regional Coordination	Develop roles and responsibilities of regional coordination team	Complete 5/24/17
	Define deliverables for regional coordination teams	Complete 5/24/17
	Build regional teams	Now established, effort ongoing
	Develop effective and attractive regional meetings annually, with training	Five created, effort ongoing

TRAINING

Strategic Objective	Action Steps	Status
Develop and Implement Training Plan	Develop Training Plan for MHBs and ensure that they are being implemented at quarterly meetings	Complete 5/24/17
Survey of directors on training topics of interest	Customize regional training sessions to the needs of MHBs	Ongoing
	Find appropriate speakers for regional events	