

SITE VISIT GUIDELINES

IMPERIAL COUNTY MENTAL HEALTH BOARD

PURPOSE/GOAL:

- A. For the individual Board Member to obtain an understanding and knowledge of a single program offered by their region.
- B. To provide a verbal report to their board and a written report available to all boards with sufficient detail to allow the other board members to obtain a general knowledge of the program.
- C. To become the contact person/liaison on the board for that specific programs needs or promotion.

PROCESS & PORCEDURE:

Selection and Assignment of Programs

- 1) Once a year the Chairperson will request 3 program preferences from each Board Member, of those programs they would be interested in visiting.
- 2) The Executive Committee will review the requests and assign each board member to a program based on the preference noted. Please note—board members may not be assigned to a program in which they are participating or have a family member participating.
- 3) A copy of the assignments will be given to the Manager who will notify the Supervisors of the programs.

Scheduling the Visit

- 4) The Board Member should make the first call to begin the site visit process.
 - a. Call the Program Supervisor to schedule the site visit. This should be done at least two weeks prior to the time you would like to make the site visit. The site visit will take a minimum of one hour and may last two or three hours depending on the particular program and timing of the visit.
 - b. When you call, introduce yourself by name and as a member of the Mental Health Board.
 - c. The Supervisor should already be aware of why you are calling, however you should mention the reason for your call. Explain that you would like to arrange an appointment to meet with them and visit the program and/or facility on behalf of the Board.
 - d. Make sure to provide the Supervisor with your phone number, in case the appointment needs to be rescheduled.
 - e. It is a good idea to call and confirm the appointment the day before the visit.

The Visit

- 5) Appropriate business style attire should be worn, along with your ID badge.
- 6) Follow the questions on the Site Visit Form to obtain the basic information. The board member must fill out the form from their notes taken during the meeting. This form should not be given to the program director to fill out.
- 7) Please remember that you are representing the entire board. If you have a specific personal issue with the program that you are interested in, make sure it is applicable to this review. (Other personal interests should be addressed at a separate meeting.)

The Reports – Written and Verbal

- 8) Use the official Report Form and fill it out by typing or printing with black ink.
- 9) Be as brief and concise as possible. Emphasize the key aspects of the program in the written report.
- 10) You will be required to present your review at one of the monthly board meetings. During your verbal report you may want to mention some of the ore minor details from your site visit notes that could not be included in your written report due to lack of space.
- 11) Your written report will be distributed to the board during the meeting you present your verbal report. On that day please bring in enough copies for all board members plus a few extra. If you have no means to create these copies, notify the Board Liaison ahead of time and they will print them for you.
- 12) The verbal report should give the board basic understanding of the program even without the written report.