



Champaign County Mental Health Board (CCMHB) Meeting Agenda Wednesday, October 21, 2026, 5:45PM

This meeting will be held in person at the Shields-Carter Room of the Bennett Administrative Center, 102 E. Main St., Urbana, IL 61801. Members of the public may attend in person or virtually, using <https://us02web.zoom.us/j/81393675682> Meeting ID: 813 9367 5682

I. Call to order

II. Roll call

III. Approval of Agenda*

IV. Schedules and Timelines

For information only are the CCMHB Meeting Schedule and Timeline, [posted here](https://ccmhddbrds.org/ords/f?p=189:9:::) (<https://ccmhddbrds.org/ords/f?p=189:9:::>), and the Champaign County Developmental Disabilities Board (CCDDB) Meeting Schedule and Timeline, [posted here](https://ccmhddbrds.org/ords/f?p=189:8:::) (<https://ccmhddbrds.org/ords/f?p=189:8:::>).

V. Acronyms and Glossary

For information only, an updated glossary of terms is [posted here](https://ccmhddbrds.org/ords/f?p=189:12:::) (<https://ccmhddbrds.org/ords/f?p=189:12:::>).

VI. Public Participation/Agency Input. See below for details.**

VII. Chairperson's Comments – Jane Sprandel

VIII. Executive Director's Comments – Lynn Canfield

IX. Approval of CCMHB Board Meeting Minutes (pages 5-12)*

Action is requested to approve minutes of the September 23, 2026 CCMHB meeting and September 30, 2026 joint study session.

X. Vendor Invoice Lists (pages 13-16)*

Action is requested to accept the "Vendor Invoice Lists" and place them on file.

XI. Old Business

a) **Summer Initiatives Panel Discussion** (pages 17-18)

Representatives of the Champaign County Community Coalition and Don Moyer Boys and Girls Club will moderate a panel discussion of young people who participated in summer programs. For information only is a guide with more detail on presenters and topic. No action is requested.

b) **Draft Revisions to Fiscal Year 2027 Budgets** (pages 19-28)*

A Decision Memorandum proposes changes to the earlier approved 2027 CCMHB budget, also detailed in the attached budget documents. Action is requested to approve these changes.

XII. New Business

a) **Agency Program Year 2026 Audit/Review Progress** (pages 29-30)

A Briefing Memorandum provides an update on agency audit/financial review start dates, which have been requested in order to understand more clearly how much time is needed for these reports. No action is requested.

b) **Organizational Health Assessment Proposed Modernization Plan** (pages 31-58)

A Proposed Modernization Plan resulting from the recent organizational assessment is included for information only. Pending review by the State's Attorney's Office Civil Division, the CCMHB and Champaign County Developmental Disabilities Board (CCDDB) might adopt or modify the plan, or portions of the plan, to implement over the next two years. No action is requested.

XIII. Reports

a) **Evaluation Capacity Evaluation Capacity Building Project Update**

An oral update will be provided. See resources developed by the team at <https://www.familyresiliency.illinois.edu/resources/microlearning-videos>.

b) **Staff Reports** (pages 59-68)

Reports from Kim Bowdry, Leon Bryson, Stephanie Howard-Gallo, and Shandra Summerville are included for information only.

c) **Financial Reports** (pages 69-72)

A statement of activities and fund balance tracker are included for information. No action is requested.

d) **Community Behavioral Health Needs Assessment Activities** – deferred.

e) **Anti-Stigma Projects**

An oral update will be provided. See also <https://disabilityresourceexpo.org> and <https://champaigncountyair.com/>. No action is requested.

XIV. Public Participation/Agency Input. See below for details.**

XV. Board to Board Reports (pages 73-74)

XVI. County Board Input

XVII. Champaign County Developmental Disabilities Board Input

XVIII. Board Announcements and Input

XIX. Adjournment

Upcoming Meetings: November 18 and December 9, 2026

* Board action is requested.

**Public input may be given virtually or in person. If the time of the meeting is not convenient, you may communicate with the Board by emailing stephanie@ccmhb.org or leon@ccmhb.org any comments for us to read aloud during the meeting. The Chair reserves the right to limit individual time to five minutes and total time to twenty minutes. All feedback is welcome. The Board does not respond directly but may use input to inform future actions. Agency representatives and others providing input which might impact Board actions should be aware of the [*Illinois Lobbyist Registration Act, 25 ILCS 170/1*](#), and take appropriate [*steps to be in compliance with the Act*](#).

For accessible documents or assistance with any portion of this packet, please [*contact us*](#) (leon@ccmhb.org).

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CHAMPAIGN COUNTY MENTAL HEALTH BOARD (CCMHB) MEETING

Minutes September 23, 2026

This meeting was held at the Scott M. Bennett Administrative Center

102 E. Main St., Urbana, IL

and with remote access.

5:45 p.m.

MEMBERS PRESENT:

Den Arres, Molly McLay, Elaine Palencia, Tony Nichols, Kyle Patterson, Jane Sprandel, Jen Straub

MEMBERS EXCUSED:

Jon Paul Youakim

STAFF PRESENT:

Kim Bowdry, Leon Bryson, Lynn Canfield, Shandra Summerville

OTHERS PRESENT:

Jacinda Dariotis, Vernaliz Jimenez, UIUC; Cindy Crawford, Community Services Center of Northern Champaign County (CSCNCC); Jessie Heckenmueller, Champaign County Regional Planning Commission (CCRPC); Brenda Eakins, GROW in IL; Angie Pierce, Cunningham Children's Home; Patty Walters, DSC; Kerri Hacker, Citizen

CALL TO ORDER:

CCMHB President Sprandel called the meeting to order at 5:47 p.m.

ROLL CALL:

Roll call was taken, and a quorum was present.

APPROVAL OF AGENDA:

The agenda was approved.

CCDDB and CCMHB SCHEDULES:

Links of CCDDB and CCMHB meeting schedules and CCMHB allocation timeline were included in the packet.

ACRONYMS and GLOSSARY:

A link of commonly used acronyms was included for information.

CITIZEN INPUT / PUBLIC PARTICIPATION:

None.

PRESIDENT'S COMMENTS:

Chair Sprandel had no comments.

EXECUTIVE DIRECTOR'S COMMENTS:

Director Canfield briefly reviewed the agenda.

APPROVAL OF MINUTES:

Minutes from the July 22, 2026 meeting were included in the board packet for review.

MOTION: Ms. Straub moved to approve the minutes of the CCMHB's meeting on July 22, 2026. Ms. Palencia seconded the motion. A voice vote was taken and the motion passed unanimously.

APPROVAL OF VENDOR INVOICE LISTS:

The Vendor Invoice List was included in the packet.

MOTION: Ms. McLay moved to accept the Vendor Invoice Lists as presented in the Board packet. Mx. Arres seconded. A voice vote was taken and the motion passed.

OLD BUSINESS:

Review of Select Client Data:

A Briefing Memorandum presented up to four years of client data, in three categories, from all programs funded during Program Year 2026. Board members commented on the data presented.

NEW BUSINESS:

Fund Balance Policy Review:

A Decision Memorandum described the longstanding fund balance target and offered detail on annual fluctuations. Director Canfield provided background information.

MOTION: Ms. McLay moved to affirm to fund balance policy of maintain between 25% and 50% of the total annual budget throughout the year. Mx. Arres seconded the motion. A voice vote was taken and the motion passed unanimously.

Draft 2027 Objectives for Three-Year Plan:

A Briefing Memorandum was included in the Board packet, as well as a draft of the 2027 Objectives for the Three-Year Plan. The document will be sent to community partners and funded agencies for feedback. A final draft will be presented at a future Board meeting for approval.

Draft Program Year 2028 Funding Priorities:

A Briefing Memorandum was included in the Board packet, as well as a draft of the Program Year 2028 Funding Priorities. A final draft will be presented at a future Board meeting for approval.

REPORTS:

Evaluation Capacity Building Project:

Jacinda Dariotis provided an update. Virnaliz Jimenez was introduced as a new staff member for the project.

Staff Reports:

Staff reports from Kim Bowdry, Leon Bryson, Shandra Summerville, Stephanie Howard-Gallo, and Chris Wilson were included in the packet.

Community Behavioral Health Needs Assessment Activities:

Director Canfield provided an update.

Anti-Stigma Projects:

A report on planned anti-stigma activities for 2026 was included in the packet.

Program Year 2026 Fourth Quarter Service Activity Reports:

Fourth Quarter Service Activity Reports were included in the packet.

PUBLIC PARTICIPATION AND AGENCY INPUT:

None.

BOARD TO BOARD REPORTS:

Elaine Palencia attended a Community Coalition meeting.

COUNTY BOARD INPUT:

None.

CHAMPAIGN COUNTY DEVELOPMENTAL DISABILITIES BOARD (CCDDB) INPUT:

The CCDDB met earlier in the day with similar agenda items.

BOARD ANNOUNCEMENTS AND INPUT:

The October 14, 2026 study session will be cancelled. The next meeting of the CCMHB will be September 30, 2026 for a joint study session with the CCDDB.

ADJOURNMENT:

The meeting adjourned at 6:45 p.m.

Respectfully Submitted by:

Stephanie Howard-Gallo

CCMHB/CCDDB Compliance and Operations Coordinator

**Minutes are in draft form and subject to CCMHB approval.*

***CHAMPAIGN COUNTY MENTAL HEALTH
BOARD (CCMHB)***

And

***CHAMPAIGN COUNTY DEVELOPMENTAL
DISABILITIES BOARD (CCDDB)***

Joint Study Session Minutes September 30, 2026

***This meeting was held at the Scott M. Bennett Administrative Center
102 E. Main St., Urbana, IL 61801 and remotely.
5:45 p.m.***

MEMBERS PRESENT:

Anne Robin, Kim Fisher, Susan Fowler, Elaine Palencia, Molly McLay(remote), Jane Sprandel, Jen Straub

MEMBERS EXCUSED:

Neil Sharma, Dianne Gordon, Den Arres, Alejandro Gomez, Tony Nichols, Kyle Patterson, Jon Paul Youakim

STAFF PRESENT:

Kim Bowdry, Lynn Canfield (remote), Stephanie Howard-Gallo

OTHERS PRESENT:

Anne Percy, Cunningham Children's Home; Brenda Eakins, GROW; Angela Yost, Regional Planning Commission (RPC); Kelli Martin, Laura Bennett, Anne Marshall, DSC; Hannah Sheets, Debra Wood, Becca Obuchowski, Community Choices; Jen Buoy, Eric Beasley, Tara Verse, Edgar Hryhorysak, Rachel Viscuso, Chloe Briskin, Jamesa Lee, Self-Advocates.

CALL TO ORDER:

CCMHB President Sprandel and CCDDB President Robin called the meeting to order at 5:46 p.m.

ROLL CALL:

Roll call was taken. A quorum was not present.

APPROVAL OF AGENDA:

The agenda was in the packet. No formal action was taken due to the lack of a quorum.

CITIZEN INPUT / PUBLIC PARTICIPATION:

None.

PRESIDENT'S COMMENTS:

Presidents Sprandel and Robin welcomed everyone.

ASSOCIATE DIRECTOR'S COMMENTS:

Kim Bowdry thanked everyone for coming. Dr. Kim Fisher provided background information on why feedback from the self-advocates was important to our work.

STUDY SESSION: Advocate Feedback on CCDDDB Resolution

Members of the Community Choices Human Rights and Advocacy Group and Advocates who work with DSC presented on how to advance the CCDDDB Resolution and Pledge. Presenter bios and the presentation were included in the packet. The resolution was included in the packet. Board members were given an opportunity to ask questions after the self-advocates' presentation.

PUBLIC PARTICIPATION AND AGENCY INPUT:

None.

BOARD ANNOUNCEMENTS AND INPUT:

None.

ADJOURNMENT:

The session ended at 7:25 p.m.

Respectfully Submitted by:

Stephanie Howard-Gallo, CCMHB/CCDDB Compliance and Operations Coordinator

**Minutes are in draft form and subject to CCMHB and CCDDB approval.*



Champaign County Mental Health Board
Vendor Invoice List – September 2026



VENDOR NAME	INVOICE	INVOICE NET	INVOICE DESCRIPTION	CHECK DATE
C-U AT HOME	Sep'26 MHB27-021	24,583.00	MHB27-021 Shelter Case Management	9/4/2026
CHAMPAIGN COUNTY TREASURER	Sep'26 MHB26-006	5,325.00	MHB26-006 Champaign County Children's Advocacy Center	9/4/2026
CHAMPAIGN COUNTY TREASURER	Sep'26 MHB27-026	34,255.00	MHB27-026 Early Childhood Ment	9/4/2026
CHAMPAIGN COUNTY TREASURER	Sep'26 MHB27-004	15,750.00	MHB27-004 Homeless Services Sy	9/4/2026
CHAMPAIGN COUNTY TREASURER	Sep'26 MHB26-025	6,362.00	MHB26-025 Youth Assessment Cen	9/4/2026
CHAMPAIGN COUNTY TREASURER	Sep'26 Office Rent	2,327.88	Sep'26 Office Rent 053	9/4/2026
CHAMPAIGN COUNTY TREASURER	1120	890.00	Aug'26 Information Technology Service	9/11/2026
CDS OFFICE SYSTEMS	INV1800123	14.30	053 MHB CDS Contract 14173-01	9/4/2026
CDS OFFICE SYSTEMS	INV1803636	0.35	Copier Maintenance 8/6/26 - 9/5/26	9/25/2026
CHAMPAIGN COUNTY CHRISTIAN HEALTH CENTER	Sep'26 MHB26-029	8,333.00	MHB26-029 Mental Health Care	9/4/2026
CHAMPAIGN MULTIMEDIA GROUP	304443252	282.80	Acct # 99226307	9/18/2026
COMMUNITY SERVICE CENTER OF NORTHERN	Sep'26 MHB26-008	5,888.00	MHB26-008 Resource Connection	9/4/2026
COURAGE CONNECTION	Sep'26 MHB27-007	14,706.00	MHB27-007 Courage Connection	9/4/2026
CRISIS NURSERY	Sep'26 MHB26-005	7,500.00	MHB26-005 Beyond Blue Champaign	9/4/2026



Champaign County Mental Health Board
Vendor Invoice List – September 2026



VENDOR NAME	INVOICE	INVOICE NET	INVOICE DESCRIPTION	CHECK DATE
CUNNINGHAM CHILDRENS HOME	Sep'26 MHB27-018	22,029.00	MHB27-018 ECHO Housing and Employment	9/4/2026
CUNNINGHAM CHILDRENS HOME	Sep'26 MHB27-036	24,877.00	MHB27-036 Families Stronger To	9/4/2026
DEVELOPMENTAL SERVICES CENTER OF	Sep'26 MHB26-012	58,500.00	MHB26-012 Family Development	9/4/2026
DON MOYER BOYS & GIRLS CLUB	Sep'26 MHB27-015	7,844.00	MHB27-015 CU Change	9/4/2026
EAST CNTRL IL REFUGEE MUTUAL ASSIST CTR	Sep'26 MHB26-001	6,286.00	MHB26-001 Family Support & Str	9/4/2026
ALEXANDER F CAMPBELL	831-2646	2,524.95	Q4 MHB26-038 CCMHB/CCDDB System Support	9/18/2026
ALEXANDER F CAMPBELL	837-2652	1,200.00	Enhancement - Outcome Measure Report	9/25/2026
EMPLOYEE VENDOR	Bowdry 9/4/26	34.81	Travel Log 7/1/26 - 8/31/26	9/11/2026
EMPLOYEE VENDOR	Bryson 9/4/26	37.70	Travel Log 7/1/26 - 8/31/26	9/11/2026
FAMILY SERVICE OF CHAMPAIGN COUNTY	Sep'26 MHB26-014	11,943.00	MHB26-014 Counseling	9/4/2026
FAMILY SERVICE OF CHAMPAIGN COUNTY	Sep'26 MHB26-016	3,182.00	MHB26-016 Self-Help Center	9/4/2026
FAMILY SERVICE OF CHAMPAIGN COUNTY	Sep'26 MHB26-017	17,863.00	MHB26-017 Senior Counseling an	9/4/2026
FIRST FOLLOWERS	Sep'26 MHB27-034	5,791.00	MHB27-034 FirstSteps Community	9/4/2026
FIRST FOLLOWERS	Sep'26 MHB27-003	7,500.00	MHB27-003 Peer Mentoring for R	9/4/2026



Champaign County Mental Health Board
Vendor Invoice List – September 2026



VENDOR NAME	INVOICE	INVOICE NET	INVOICE DESCRIPTION	CHECK DATE
GREATER COMMUNITY AIDS PROJECT OF EAST CENTRAL IL	Sep'26 MHB27-022	9,489.00	MHB27-022 Advocacy, Care, and	9/4/2026
GROW IN ILLINOIS	Sep'26 MHB27-011	14,317.00	MHB27-011 Peer Support	9/4/2026
IMMIGRANT SERVICES OF CHAMPAIGN-URBANA	Sep'26 MHB26-010	16,688.00	MHB26-010 Immigrant Mental Hea	9/4/2026
MEGHAN E MCDONALD	2 / September	1,320.00	MHB26-020 Resource Book, Websi	9/4/2026
MCS OFFICE TECHNOLOGIES INC	01-715246	163.00	Sep'26 MHB/DDB Managed IT Service	9/11/2026
NACBHDD	INV000341	120.00	2026 Fall Conference Registration 10/21/26	9/11/2026
PROMISE HEALTHCARE	Sep'26 MHB26-013	30,000.00	MHB26-013 Mental Health Services	9/4/2026
PROMISE HEALTHCARE	Sep'26 MHB26-041	10,416.00	MHB26-041 Wellness	9/4/2026
QUILL CORPORATION	50228760	44.28	Acct # 8197518	9/11/2026
RAPE, ADVOCACY, COUNSELING & EDUCATION SERVICES	Sep'26 MHB26-035	16,350.00	MHB26-035 Sexual Trauma Therapy	9/4/2026
RAPE, ADVOCACY, COUNSELING & EDUCATION SERVICES	Sep'26 MHB26-002	9,009.00	MHB26-002 Sexual Violence Prevention Education	9/4/2026
ROSECRANCE, INC.	Sep'26 MHB27-019	15,083.00	MHB27-019 Benefits Case Manage	9/4/2026
ROSECRANCE, INC.	Sep'26 MHB27-023	10,416.00	MHB27-023 Recovery Home	9/4/2026
ILLINI MEDIA COMPANY	2026117991119	100.00	RFP Bid Notification	9/25/2026
UNITING PRIDE	Sep'26 MHB27-009	18,754.00	MHB27-009 Children, Youth, & F	9/4/2026



Champaign County Mental Health Board
Vendor Invoice List – September 2026



VENDOR NAME	INVOICE	INVOICE NET	INVOICE DESCRIPTION	CHECK DATE
UNIVERSITY OF ILLINOIS	Sep'26 Award 112237	11,488.33	MHB23-039 Building Agency Eval	9/4/2026
URBANA ADULT EDUCATION	Sep'26 MHB27- 042	7,225.00	MHB27-042 CU Early	9/4/2026
WIMBUSH CONSULTING LLC	1018	1,475.00	MHB26-070 Organizational Health	9/25/2026
WOMEN IN NEED RECOVERY	Sep'26 MHB26- 069	15,250.00	MHB26-069 Community Support Reentry Houses	9/4/2026
WOMEN IN NEED RECOVERY	Sep'26 MHB27- 065	17,500.00	MHB27-065 WIN Resilience Resource Center	9/4/2026

CCMHB Presentation

Don Moyer Boys & Girls Club – Community Coalition Summer Initiatives

Presenters: Monica Miles-Shellman, CEO, Don Moyer Boys & Girls Club; Tracy Parsons, Community Relations Manager, City of Champaign

Total time: 20–25 minutes, including Board Q&A

Purpose

Demonstrate how Summer Initiatives help young people build confidence, develop skills, strengthen relationships, navigate challenges, and envision a positive future for themselves and their communities.

Presentation Agenda

1. Opening and Overview

Presenter: Monica Miles-Shellman, 3 minutes

- Describe Don Moyer Boys & Girls Club's role in coordinating and delivering Summer Initiatives.
- Highlight community partnerships (final partner count pending).
- Provide a brief overview of the types of summer programming offered.

2. Youth Panel

Facilitator: Tracy Parsons, 12–15 minutes

Panelists:

Jye Hunter, Don Moyer Boys & Girls Club

Nathan Telesford, Don Moyer Boys & Girls Club

Mathew Rodgers, Youth for Christ

Shaniya Lockett, Youth for Christ

Discussion Questions:

1. Please introduce yourself.
2. How has Don Moyer Boys & Girls Club or Youth for Christ made a difference in your life?
3. Which programs, activities, or supports have been most helpful to you, and why?

4. What challenges are young people facing today at school and in the community?
5. What could help our community prevent and address violence more effectively?
6. What do adults often misunderstand about what young people need?

3. Board Q&A

Facilitated by: Tracy Parsons, 5–7 minutes

- Invite Board members to ask panelists follow-up questions and share reflections.

4. Closing

Presenter: Monica Miles-Shellman, 2 minutes



DECISION MEMORANDUM – 2027 BUDGET REVISIONS

DATE: October 21, 2026
TO: Champaign County Mental Health Board (CCMHB)
FROM: Lynn Canfield, Executive Director
SUBJECT: Fiscal Year 2027 CCMHB Fund Budget

Overview:

This memorandum presents revisions to the approved 2027 budgets for the CCMHB, Champaign County Developmental Disabilities Board (CCDDB), and I/DD Special Initiatives Funds for County Fiscal Year 2027 (January 1 - December 31, 2027). Approval is requested for the CCMHB Fund budget revisions which result from revenue and expense recalculations. The CCDDB budget is for information only, due to administrative cost sharing.

Initial drafts were approved in July 2026 and formed the basis for planning. Initial approved budgets were submitted to the County's online system for the Champaign County Board's August budget hearings, and the County Finance Department and County Executive's Office provided updated estimates for property tax revenues and employee health insurance costs. Final budgets will be presented during their appropriations process in November. Because the CCDDB and CCMHB each have authority over their budgets, approvals are requested prior to submission of any revised budgets to the County Board.

Attached are 2027 CCDDB, CCMHB, and I/DD Special Initiative Fund Budgets, with revisions as described here and italicized, with background details for 2027, projected 2026, and actual amounts for 2014 through 2025. An Intergovernmental Agreement between the Boards defines cost sharing and other arrangements. The I/DD Special Initiatives Fund Budget is under joint authority of the Boards and is expected to have no activity during 2027.

Highlights of Initial Approved Versions:

- Projected 2027 property tax revenue assumes 2.7% growth over 2026 for the CCDDB and CCMHB, with no adjustment for collection rate below 100%.
- Miscellaneous Revenue includes revenue returned by agencies in a different fiscal year than paid (CCDDB and CCMHB budgets).
- Miscellaneous Revenue also includes event revenue, refunds, and honoraria. These are paid to the CCMHB and then split between the Boards (CCMHB budget).
- Contributions & Grants are the largest expense in each budget, as they include contracts with organizations for services to populations of focus (CCDDB and CCMHB budgets).

- Changes to expense categories, per the County’s revised “Chart of Accounts”, appear as recent fluctuations, especially across Professional Services, Operational Services, and Outside Services (CCMHB budget).
- Non-payroll insurance includes a new cost, estimated \$40,000 for Health Reimbursement Arrangement billings for 2026 to be paid in 2027. The County covered these costs in 2025. This amount might be lowered to reflect CCMHB staff costs as compared to total County, but for now the larger amount is included (CCMHB budget).
- Per the Intergovernmental Agreement Addendum, the Boards may transfer equal amounts out of the I/DD Special Initiatives Fund and use these funds (currently estimated as \$155,393 each) to improve their fund balance positions in anticipation of May and June 2027 agency payments. There is a motion below to approve ‘zeroing out’ this fund at the end of 2026, by transferring what remains (all funds, 2026 and 2027 budgets.)
- Some CCMHB expenses are not shared by the CCDDDB (MHB Contributions & Grants and MHB-specific insurance, for example).

Recommended Revisions:

- Increased estimated property tax levy revenues (MHB and DDB budgets).
- Increased Contributions and Grants (MHB and DDB budgets).
- Increased Personnel costs, with a small adjustment to health insurance cost (to correct previous error), salaries adjusted per 2026-2027 compensation review, and FICA and IMRF adjusted to align (MHB budget).
- Increased cost-sharing expense from DDB, as revenue to MHB (MHB and DDB budgets).
- While we do expect to lower the “Non-Payroll Insurance” amount for Health Reimbursement Arrangement billings, the new formula is not yet available so no revision is proposed at this time (MHB budget).

Decision Section:

Motion to approve the attached revised 2027 CCMHB Budget, with anticipated revenues and expenditures of \$7,688,691.

☐ Approved
☐ Denied
☐ Modified
☐ Additional Information Needed

Draft 2027 CCMHB Budget

LINE ITEM	BUDGETED REVENUE	
400101	Property Taxes, Current	\$7,112,375
400103	Back Property Taxes	\$2,000
400106	Mobile Home Tax	\$3,000
400104	Payment in Lieu of Taxes	\$2,000
400476	CCDDB Revenue	\$504,316
400801	Investment Interest	\$40,000
400901	Gifts & Donations	\$1,000
400902	Misc & Expo Revenue	\$24,000
	TOTAL REVENUE	\$7,688,691

LINE ITEM	BUDGETED EXPENDITURES	
500102	Appointed Official	\$123,365
500103	Regular FTE	\$433,975
500105	Temporary Salaries & Wages	\$500
500108	Overtime Wages	\$500
500301	Social Security/FICA	\$42,637
500302	IMRF Employer Cost	\$17,389
500304	Workers' Comp Insurance	\$2,544
500305	Unemployment Insurance	\$3,010
500306	Health/Life Insurance	\$144,318
	Personnel Total	\$768,238
501001	Stationery & Printing (Printing & Copier Suppl)	\$4,000
501002	Office Supplies	\$3,000
501003	Books, Periodicals, and Manuals	\$200
501004	Postage, UPS, Fed Ex	\$1,200
501005	Food, Non-Travel	\$1,800
501012	Uniforms (Expo T-shirts)	\$500
501013	Non-Food Supplies	\$200
501017	Equipment Less Than \$5000	\$8,400
501019	Operational Supplies	\$2,500
501021	Employee Development/Recognition	\$200
	Commodities Total	\$22,000
502001	Professional Services	\$190,000
502002	Outside Services (Computer Services)	\$1,000
502003	Travel Costs	\$6,000
502004	Conferences and Training (Employee only)	\$2,000
502005	Training Programs (Non-Employee)	\$3,000
502007	Insurance (Non-Payroll)	\$60,000
502013	Rent (Office, Storage, Booths, Event Venue)	\$43,500
502014	Finance Charges/Bank Fees	\$30
502019	Advertising, Legal Notices (adds Expo Marketing & Promotion)	\$7,000
502021	Dues, License, & Membership	\$20,000
502022	Operational Services (accounting, IT, and payroll admin, plus Zoom, domain names, web hosting, surveys)	\$45,000
502024	Public Relations (Anti-Stigma)	\$15,000
502025	Contributions & Grants	\$6,482,923
502035	Repairs and Maintenance (Equip, Auto)	\$1,000
502045	Attorney/Legal Services	\$1,000
502046	Equipment Lease/Rental (Copier)	\$1,500
502047	Software License & SAAS (user license, software cloud & installed)	\$14,000
502048	Phone/Internet	\$2,500
	Services Total	\$6,895,453
700101	Interfund Transfer, CCDDB (Share of Expo and some of Other Misc Rev)	\$3,000
	Interfund Transfers TOTAL	\$3,000
TOTAL EXPENSES*		\$7,688,691

Draft 2027 CCDDDB Budget

LINE ITEM	BUDGETED REVENUE	
400101	Property Taxes, Current	\$5,840,960
400103	Back Property Taxes	\$2,000
400106	Mobile Home Tax	\$3,000
400104	Payment in Lieu of Taxes	\$2,000
400801	Investment Interest	\$40,000
600101	Transfers In (Portions of Rev Shared by MHB)	\$3,000
400902	Other Miscellaneous Revenue	\$3,000
	TOTAL REVENUE	\$5,893,960

LINE ITEM	BUDGETED EXPENDITURES	
5002001	Professional Services (42.15% of an adjusted set of CCMHB Admin Expenses)	\$504,316
502007	Insurance	\$5,157
502025	Contributions & Grants	\$5,384,487
	TOTAL EXPENSES	\$5,893,960

Draft 2027 I/DD Special Initiatives

Fund Budget

LINE ITEM	BUDGETED REVENUE	
400801	Investment Interest	\$0
-	From Fund Balance	\$0
	TOTAL REVENUE	\$0

LINE ITEM	BUDGETED EXPENDITURES	
501017	Equipment Less than \$5,000 (includes a designated gift for the benefit of one individual, accessed at family request, with balance \$1518 as of July 1, 2026, expected to be paid out during 2026.)	\$0
502001	Professional Services (legal, accounting, if needed)	\$0
502025	Contributions and Grants	\$0
700101	Transfers out, to MHB and DDB funds	\$0
	TOTAL EXPENSES	\$0

Background for 2027 CCMHB Budget, with 2026 Projections and Earlier Actuals

2027 BUDGETED REVENUE		2026 PROJECTED	2025 ACTUAL	2024 ACTUAL	2023 ACTUAL	2022 ACTUAL	2021 ACTUAL	2020 ACTUAL	2019 ACTUAL	2018 ACTUAL	2017 ACTUAL	2016 ACTUAL	2015 ACTUAL	2014 ACTUAL
Property Taxes, Current	\$7,112,375	\$6,849,360	\$6,586,669	\$6,304,478	\$5,937,146	\$5,492,390	\$5,278,325	\$4,880,491	\$4,813,598	\$4,611,577	\$4,415,651	\$4,246,055	\$4,161,439	\$4,037,720
Back Property Taxes	\$2,000	\$2,000	\$0	\$0	\$0	\$8,824	\$0	\$3,382	\$6,489	\$494	\$2,731	\$2,486	\$2,861	\$1,612
Mobile Home Tax	\$3,000	\$3,000	\$0	\$3,543	\$3,920	\$3,700	\$0	\$3,736	\$4,062	\$3,909	\$3,766	\$3,903	\$3,995	\$3,861
Payment in Lieu of Taxes	\$2,000	\$2,000	\$451	\$327	\$2,916	\$1,474	\$3,679	\$1,088	\$2,604	\$3,406	\$3,201	\$2,970	\$2,869	\$2,859
CCDDB Revenue	\$504,316	\$453,761	\$407,429	\$386,077	\$389,194	\$358,450	\$366,344	\$346,706	\$409,175	\$310,783	\$287,697	\$377,695	\$330,637	\$337,536
Investment Interest	\$40,000	\$40,000	\$94,783	\$88,142	\$99,693	\$47,855	\$1,343	\$7,627	\$45,950	\$41,818	\$18,473	\$3,493	\$1,385	\$1,015
Gift & Donations	\$1,000	\$600	\$1,070	\$575	\$450	\$0	\$100	\$2,900	\$4,706					
Expo Revenue (combined with Other Misc Rev)	\$0	\$0	\$0	\$0	\$0	\$0	\$100	\$13,805	\$14,275	\$21,613	\$5,225	\$18,822	\$26,221	\$28,192
Other Misc Revenue	\$24,000	\$22,000	\$60,522	\$19,667	\$22,057	\$55,161	\$2,205	\$80	\$129,028	\$29,955	\$117,195	\$21,340	\$67,599	\$85,719
Transfers In	\$0	\$155,393	\$0	\$0	\$0	\$0	\$770,436							
TOTAL REVENUE	\$7,688,691	\$7,528,114	\$7,150,924	\$6,802,809	\$6,455,376	\$5,967,854	\$6,422,532	\$5,259,815	\$5,429,887	\$5,023,555	\$4,853,939	\$4,676,764	\$4,597,006	\$4,498,514

* Per the County Board, the full amount of ARP request was deposited during 2021, with half spent in 2021 and the other half in 2022. This results in the appearance of a surplus in 2021 and deficit in 2022, though the fund balance covered it.

2027 BUDGETED EXPENDITURES (SEE PAGE 5 FOR DETAILS)		2026 PROJECTED	2025 ACTUAL	2024 ACTUAL	2023 ACTUAL	2022 ACTUAL	2021 ACTUAL	2020 ACTUAL	2019 ACTUAL	2018 ACTUAL	2017 ACTUAL	2016 ACTUAL	2015 ACTUAL	2014 ACTUAL
Personnel	\$768,238	\$685,697	\$641,884	\$607,029	\$581,916	\$564,444	\$564,542	\$544,001	\$517,053	\$522,073	\$449,220	\$577,548	\$502,890	\$532,909
Commodities	\$22,000	\$21,600	\$18,282	\$18,887	\$19,411	\$10,930	\$8,632	\$12,362	\$11,147	\$10,049	\$6,263	\$7,998	\$11,237	\$9,282
Services (not Contrib & Grants)	\$412,530	\$375,530	\$311,683	\$321,874	\$342,829	\$283,066	\$268,512	\$286,912	\$286,376	\$404,059	\$432,828	\$410,157	\$382,870	\$375,735
*Contributions & Grants	\$6,482,923	\$6,246,827	\$5,482,613	\$5,855,312	\$5,227,318	\$5,288,028	\$5,063,438	\$4,495,820	\$3,993,283	\$3,648,188	\$3,593,418	\$3,428,015	\$3,335,718	\$3,673,966
Transfers Out	\$3,000	\$1,400	\$5,855	\$5,907	\$132,599	\$6,908	\$28,430	\$5,819	\$406,505	\$56,779	\$57,288	\$60,673	\$0	\$0
Interest on Tax Case	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$1,648						
TOTAL EXPENSES	\$7,688,691	\$7,331,054	\$6,460,317	\$6,809,009	\$6,304,073	\$6,153,376	\$5,933,554	\$5,346,562	\$5,214,364	\$4,641,148	\$4,539,017	\$4,484,391	\$4,232,715	\$4,591,892

Additional Information about Expenses (Proposed 2027 versus Projected 2026)

Personnel Costs				Services (not Contributions and Grants)				Interfund Expenditures			
PERSONNEL		2027	2026	SERVICES		2027	2026	INTERFUND TRANSFERS		2027	2026
Appointed Official		\$123,365	\$119,771	Professional Services*		\$190,000	\$190,000	CCDDDB Share of Expo and some of MHB Misc Revenue		\$3,000	\$1,400
Regular FTE		\$433,975	\$421,334	Attorney/Legal Services*		\$1,000	\$1,000				
Temporary Wage/Sal		\$500	\$500	Outside Services (e.g., Computer)		\$1,000	\$4,000				
Overtime Wages		\$500	\$500	Travel Costs		\$6,000	\$6,000				
FICA		\$42,637	\$41,513	Conferences and Training (employee only)**		\$2,000	\$2,000				
IMRF		\$17,389	\$19,265								
W-Comp		\$2,544	\$2,556	Training Programs (Non-Employee)		\$3,000	\$3,000				
Unemployment		\$3,010	\$2,258								
Health/Life Insurance		\$144,318	\$78,000	Insurance (Non-Payroll)		\$60,000	\$20,000				
				Repairs (Equip/Auto)		\$1,000	\$1,000				
				Rental (Office and Expo)***		\$43,500	\$43,500				
				Rental (Equipment)		\$1,500	\$1,500				
				Finance Charges/Bank Fees		\$30	\$30				
				Advertising, Legal Notices***		\$7,000	\$7,000				
				Public Relations***		\$15,000	\$15,000				
				Dues/Licenses		\$20,000	\$20,000				
				Operational Services		\$45,000	\$45,000				
				Software License		\$14,000	\$14,000				
				Phone/Internet		\$2,500	\$2,500				
				</							

Additional Information about Services

SERVICES	2027	2026	
Professional Services*	\$190,000	\$190,000	Includes cost determined by the County foe External Audit. Also includes the cost of independent contractors, as those who have coordinated events and social media, assisted MHFA trainings, and supported agencies through Evaluation Capacity Building, Expo and AIR website maintenance and updates, maintaining and improving the online application system, improving language access and accessibility, reviewing agency audits and reviews, provided 211 information services, and offered human resources services through AAIM.
Operational Services*	\$45,000	\$45,000	Includes costs determined by the County, such as for Accounting Services and Payroll Administration, and by Intergovernmental Agreement for County IT services. Also covers departmental operating, zoom, domain names, web hosting, survey tools, and similar.
Public Relations***	\$15,000	\$15,000	Estimated for community events, anti-stigma art show(s) and film sponsorships and promotion, sponsorships of other events, in which Expo, AIR, or the Boards are promoted.
CCMHB Contributions & Grants	\$6,482,923	\$6,246,827	Estimated CCMHB payments to agencies from January 1 to June 30, 2027, as authorized in May 2026, plus 1/2 of estimated PY28 annual allocation amount, with agency contract maximums to be authorized by July 1, 2027.
CCDDB Contributions & Grants	\$5,384,487	\$5,068,949	Estimated CCDDDB payments to agencies from January 1 to June 30, 2027, as authorized in May 2026, plus 1/2 of estimated PY28 annual allocation amount, with agency contract maximums to be authorized by July 1, 2027.
Dues/ Licenses	\$20,000	\$20,000	\$1,200 national trade association (NACBHDD), \$2,000 AAIM, \$16,000 state trade association (ACMHAI), small amounts for other, such as Arc of Illinois,CBHA, IPHA, NADD,NCBH, NADSP, etc.
Conferences /Training	\$2,000	\$2,000	\$1000 registration for NACo and NACBHDD Legislative and Policy Conferences (likely offset by ACMHAI). \$500 for NACo Annual Meeting. Registration fees for other conference/training for staff members might include Mental Health America, Federation of Families, Arc of IL, NADD, or similar. Mental Health First Aid training and certification. <i>Costs of travel and meal per diems for staff for any of these conferences are included in different lines.</i>
Non-Employee Conferences / Trainings**	\$3,000	\$3,000	Registration, costs of travel, lodging, and food for board members to attend trade association meetings or other conferences or trainings of interest. Also charged here are the costs associated with Mental Health First Aid trainings and monthly learning opportunities/trainings for non-employees (e.g., case managers, other service providers, stakeholders), which can include presenters, rental, materials, promotion. Some virtual trainings.
Unexpected	N/A	N/A	Changes in supports to agencies, non-employee trainings, Public Relations, Expo or AIR costs. Public health barrier to large gatherings. Any unresolved tax liability. Cost of moving offices to a different location, greater need for legal counsel. Budget amendment if employee resignation (with benefits payout) or change in staffing. Fund balances are lowest in May and early June, at which point there should be enough for 6 months operating + share (57.85%/42.15%) of accrued staff benefits. If first tax distribution does not occur by mid-June, fund balance may be used.

Calculation of the CCDDDB Administrative Share (“Professional Services”)

Adjustments:		2027	2026
CCMHB Contributions & Grants		\$6,482,923	\$6,246,827
MHB-specific insurance cost		\$6289	6289
CCDDB Share of Donations & Misc Rev		\$3,000	\$1,400
			-
Adjustments Total:		\$6,492,212	\$6,254,516
CCMHB Total Expenditures:		\$7,688,691	\$7,331,054
Total Expenditures less Adjustments:		\$1,196,479	\$1,076,538

2027		2026*	
PROJECTED		ACTUAL	
Total Expenditures less Adjustments		CCDDDB Share	
		\$1,196,479	
Adjusted Expenditures x 42.15%		\$504,316	
Monthly Total for CCDDDB Admin		\$42,026	
		\$37,813	

*At the end of the Fiscal Year, actual expenses are updated, some revenues (e.g., Expo) are shared, and adjustments are made to the CCDDDB current year share.

Background for 2027 CCDDDB Budget, with 2026 Projections and Earlier Actuals

2027 BUDGETED REVENUES		2026 PROJECTED	2025 ACTUAL	2024 ACTUAL	2023 ACTUAL	2022 ACTUAL	2021 ACTUAL	2020 ACTUAL	2019 ACTUAL	2018 ACTUAL	2017 ACTUAL	2016 ACTUAL	2015 ACTUAL	2014 ACTUAL
Property Taxes, Current	\$5,840,960	\$5,624,961	\$5,409,229	\$5,178,683	\$4,879,251	\$4,511,249	\$4,334,187	\$4,001,872	\$3,982,668	\$3,846,413	\$3,684,009	\$3,595,174	\$3,545,446	\$3,501,362
Back Property Taxes	\$2,000	\$2,000	\$0	\$0	\$0	\$7,246	\$0	\$2,773	\$5,369	\$412	\$2,278	\$2,105	\$2,437	\$1,398
Mobile Home Tax	\$3,000	\$3,000	\$0	\$2,911	\$3,222	\$3,039	\$0	\$3,066	\$3,361	\$3,261	\$3,142	\$3,305	\$3,404	\$3,348
Payment in Lieu of Taxes	\$2,000	\$2,000	\$370	\$269	\$2,396	\$1,210	\$3,021	\$0	\$2,154	\$2,841	\$2,671	\$2,515	\$2,445	\$2,479
Investment Interest	\$40,000	\$40,000	\$92,864	\$93,333	\$84,072	\$35,285	\$791	\$4,054	\$23,508	\$24,062	\$10,883	\$2,318	\$1,488	\$812
Transfers In (MHB and IDDSI)	\$3,000	\$156,793	\$5,855	\$5,907	\$5,064	\$6,908	\$0	\$5,819	\$106,505	\$6,779	\$7,288	\$10,673	\$0	\$0
Other Misc Revenue	\$3,000	\$3,000	\$0	\$0	\$50,550	\$0	\$971	\$9,524	\$8,955	\$6,408	\$14,432	\$0	\$0	\$11,825
TOTAL REVENUE	\$5,893,960	\$5,831,754	\$5,508,318	\$5,281,103	\$5,024,555	\$4,564,937	\$4,338,970	\$4,027,108	\$4,132,520	\$3,890,176	\$3,724,703	\$3,616,091	\$3,555,220	\$3,521,224

2027 BUDGETED EXPENDITURES		2026 PROJECTED	2025 ACTUAL	2024 ACTUAL	2023 ACTUAL	2022 ACTUAL	2021 ACTUAL	2020 ACTUAL	2019 ACTUAL	2018 ACTUAL	2017 ACTUAL	2016 ACTUAL	2015 ACTUAL	2014 ACTUAL
Professional Services (42.15% of some MHB costs)	\$504,316	\$453,761	\$407,429	\$386,077	\$389,194	\$358,450	\$366,344	\$330,445	\$309,175	\$310,783	\$287,697	\$379,405	\$330,637	\$337,536
Contributions & Grants	\$5,384,487	\$5,264,402	\$4,908,976	\$4,557,261	\$4,090,901	\$3,777,207	\$3,514,153	\$3,659,691	\$3,435,748	\$3,250,768	\$3,262,938	\$3,206,389	\$3,069,122	\$3,224,172
Insurance specific to DDB	\$5,157	\$5,157	\$4,333	\$4,333										
Interfund Transfer, CILA Fund	\$0	\$0	\$0	\$0	\$50,000	\$50,000	\$50,000	\$50,000	\$50,000	\$50,000	\$50,000	\$50,000	\$50,000	\$0
Interfund Transfer to MH	\$0								\$100,000					
Interest on Tax Case	\$0				\$0	\$0	\$0	\$1,363						
TOTAL EXPENSES	\$5,893,960	\$5,723,320	\$5,320,738	\$4,947,671	\$4,530,095	\$4,185,657	\$3,930,497	\$4,041,499	\$3,894,923	\$3,611,551	\$3,600,635	\$3,635,794	\$3,449,759	\$3,561,708

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BRIEFING MEMORANDUM: AUDIT PROGRESS

DATE: October 21, 2026
TO: Champaign County Mental Health Board (CCMHB)
FROM: Lynn Canfield, Executive Director
SUBJECT: Agency Program Year 2026 Financial Reviews and Audits

Purpose:

This memorandum offers an update on a contract requirement implemented for Program Year 2026 and Program Year 2027, at the Board's suggestion, to understand how much time independent CPA firms took to complete the audits or financial reviews for each funded agency. At the time, there appeared to be great variation across organizations.

Background:

The CCMHB awards contracts through an open, competitive allocation process. They select proposals which improve the local system of services and supports for people with mental health or substance use disorders or intellectual/developmental disabilities.

Contract expectations reflect a philosophy of good faith, awarding as much of the amounts requested as possible. Most contracts are grant-based, with advance, monthly payments.

Because payments are made before the service is delivered, any reconciliation or repayment of unspent funds or improperly spent funds is based on subsequent reports. Agencies report on program and financial activities after each quarter. Reports are reviewed by CCMHB staff, who might ask for more information or revisions. Many reports are shared in full or summarized in CCMHB board meeting packets. This allows the Board to see what is going well and where adjustments might help.

The only agency reporting requirement which is not a self-report is the independent CPA's audit, financial review, or compilation report regarding the agency's most recently completed fiscal year. This report is due six months after the end of that period. In most cases, that is six months after the end of the contract year. Because these outside verifications are not available until after the contract year, return of funds or repair of negative findings occurs later.

The timeline is set so that corrections and other follow up can be completed before new funding decisions are made and new contract payments issued. Financial reviews and audits which show that an agency is in good standing help maintain the agency's funding eligibility. We rely on the information these reports provide so that the Board may make fully informed decisions, including whether any special contract provisions might be needed.

For reasons which we have documented in previous memoranda, these independent audits and reviews have not always been timely. The CCMHB has considered general circumstances

(disruptions due to the COVID-19 pandemic and workforce shortages) and specific circumstances (agencies' narrow staffing or limited access to financial professionals). The CCMHB has updated its Funding Requirements and Guidelines several times to maintain structure, clarify expectations, and adjust the deadlines.

In 2025, smaller agencies appeared to have more difficulty not just in securing a CPA firm's services but also in receiving the services in a timely manner. Although the average length of time audits and reviews take had decreased for some, it had not improved for all. The Board asked that we collect more details on the length of engagement.

Update:

We added a standard provision to agency contracts for the Program Year 2026, regarding the Program Year 2025 audits and reviews (and in one case, a 2026 audit).

"The organization will share documentation of the date their CPA firm began its work on the audit, review, or compilation."

Stephanie Howard-Gallo, Operations and Compliance Coordinator, reminded agency directors through email that this information should be shared.

- Nine of twenty-one, or 43%, responded. Some were with small or new organizations, and some larger or more experienced.
- Reported start dates varied from July 28, 2025 to December 12, 2025.
- Of the agencies responding, one financial review was delayed by the CPA firm, one was completed by the deadline but not approved by the agency's board for another two weeks, and the others were on time.
- For all funded agencies, more audits and reviews were on time during this cycle generally. If most were not aware of the new requirement, it is not likely to have had a positive impact on audit engagement. With limited start date information, we could not identify a difference in length of engagement related to agency size or type.

The provision repeated in Program Year 2027. Ms. Howard-Gallo emailed agency directors requesting information on start dates for the Program Year 2026 audits or reviews. Three of twenty-one replied: Courage Connection, Crisis Nursery, and ECIRMAC/The Refugee Center.

Ms. Howard-Gallo sent a second reminder on September 18, adding why the information will be helpful to us. As of this writing, one more agency has replied. RACES shared the onsite start date and that they have confidence in the CPA's timeline. With 19% of agencies responding, we are not able to draw meaningful conclusions.

Importantly, if an audit of the fiscal year which ended June 30, 2026 has not started by late October, it might be difficult to complete by the end of 2026.

Ms. Howard-Gallo could send a third reminder with a deadline for responses. If an organization does not share start date information, especially after three requests, we could take the additional step of withholding payments due to non-compliance with the contract requirement. An agency could exercise its right to appeal that action to the Board at the next regular business meeting.

The Board might consider whether this additional requirement delivers the value intended. If not, and if there is not another reason to retain it, we could remove it from future contracts.

WIMBUSH CONSULTING, LLC

Modernization Plan

2026 – 2028

Champaign County Mental Health Board
& Champaign County Developmental Disabilities Board

A twenty-four month implementation plan, with self-implemented
and externally facilitated options for every item

Companion to the Organizational Health Assessment dated September 18, 2026

Prepared by Wimbush Consulting, LLC for the members of the
Champaign County Mental Health Board, the members of the Champaign County
Developmental Disabilities Board, and the Executive Director

Contract MHB26-070 · September 18, 2026

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6. Phase Three — Capability *Months 13–18*
7. Phase Four — Durability *Months 19–24*
- Appendix — Crosswalk to the Assessment's Recommendation Clusters

1. How to Use This Plan

The Organizational Health Assessment named what needs building. This plan says how, over the twenty-four months from the boards' adoption, and gives each piece of work two paths: what it looks like if the boards and staff carry it themselves, and what changes if outside facilitation carries part of it. Both are filled in for every item, with the internal cost of each stated in the same terms, so that the two can be compared rather than argued about.

The choice between them belongs to the boards, item by item, and this plan does not make it for them. What the boards need in order to choose well is the evidence behind each item, the effort each path actually consumes, and the specific way each path tends to fail. All three are here. So is a method for deciding, at the end of this section. The boards adopt this sequence whole, adopt part of it, or reorder it — with the dependencies named, so that reordering is done knowingly. Where this plan and the assessment differ, the assessment controls.

Reading the two columns

Each item is presented as a small table with three rows. The work describes what actually happens under each path. Effort on the organization estimates the internal time each path consumes — and note that the facilitated column is never zero: outside facilitation shifts effort from authoring to reviewing and deciding, which is lighter but real. What to watch names the specific way each path tends to fail. That third row is the one worth reading closely; it is where the honest differences live.

Effort is expressed in bands rather than precise hours, because precision here would be false: light means under ten hours in total, moderate means roughly ten to forty, substantial means roughly forty to one hundred, and major means over one hundred. Board time is stated separately where an item consumes meeting agenda rather than staff desk time. This plan carries no cost figures. Fees depend on scope decisions the boards have not yet made, and putting numbers against undecided scope would invite the wrong conversation at the wrong moment.

A third path

The two columns describe who performs the work, and for most items they are the whole story. For a cluster of items in this plan they are not, because a third path exists: building the capacity internally — a dedicated role holding knowledge management, systems, and analysis, which the assessment identified and which staff, asked what would help most, most often named. That path is neither of the two columns. It is not self-implementation in the sense used here, because it does not draw on the hours of people who have none; and it is not facilitation, because nothing leaves the building and nothing has to be repurchased later.

Five items carry a third-path line beneath their heading, which is how this plan marks where that option is live: the records migration, the documentation program, the compliance calendar, the platform work, and the portfolio analysis. They are the same items that are hardest to self-implement at current capacity and least satisfying to hand outside, because they need doing again next year and the year after. The boards should settle that question early, in item 1.8, rather than discovering its consequences item by item. A capacity question left open does not stay open; it resolves by default, and in this organization the default is the Executive Director.

Choosing a path

Two paths per item, and a decision to make on each. Five questions, asked in order, will usually settle it — at adoption, and again later when circumstances change: after a hire, after a slower season arrives, or after an item has stalled.

- Does this require only a decision, rather than a skill? If the substance is a choice the boards are entitled to make, self-implement it. Nothing outside help adds to adopting a protocol, setting an expectation, or fixing a calendar — and buying help for such items spends credibility that the genuinely hard items will need.
- Is the expertise already in the building? Where the organization knows how — and it does, in more places than the assessment's low scores suggest — the question is capacity, not capability, which makes it the next question rather than a reason to look outside.
- Is there protected time on a named calendar, with something specific deferred to make room? If not, self-implementation is a wish. This is the question the organization's own history answers most clearly: procedures were attempted and abandoned, a position-description review happened once, previous documentation went obsolete. Honest answers here prevent a year of quiet slippage.
- Can the organization structurally do this to itself? Some things cannot be self-administered regardless of skill or time — an evaluation of the person who convenes it, an anonymous instrument in a six-person office, a verification of one's own progress. Where the structure forbids it, outside involvement is a design requirement rather than a purchase.
- If this goes unowned, does it land on the Executive Director? Where the answer is yes, treat the item as requiring either explicit protection or facilitation. An item that quietly defaults to her is not being self-implemented; it is being absorbed, and it deepens the risk this plan exists to reduce.

A sixth question applies wherever the third path is in play: would this work still need doing next year, and the year after? Documentation goes stale, compliance calendars need keeping, platforms need administering, and analysis is a habit rather than a deliverable. Recurring work bought from outside has to be bought again; recurring work built into a role compounds. That is the specific case for internal capacity, and it does not extend to the one-time items — which is why the third path is marked on a handful of items in this plan rather than on all of them.

A note on the pattern those questions produce. Most of this plan is internal work under either path, and the items where outside involvement earns its place cluster tightly and for structural reasons: documentation at a volume the current capacity cannot absorb, an evaluation the board cannot credibly administer to itself, coaching no one can deliver to themselves, accessibility and platform work that is a different profession entirely, and a verification that requires independence to mean anything. The boards should hold any proposal — including any from the author of this plan — to the same test.

How the phases work

The four phases are sequenced by dependency, not by convenience. Phase One establishes the instruments the later phases attach to and delivers the fastest visible wins. Phase Two builds the architecture those wins need in order to last. Phase Three converts documents into practiced capability — the difference between having a continuity plan and being ready. Phase Four makes the whole thing durable and verifies it. Items can move earlier; moving them later is usually safe; moving a Phase Three item into Phase One generally is not, because it will have nothing to stand on.

One structural condition governs everything below: this plan needs a named owner, and that owner cannot by default be the Executive Director. The assessment's central finding is that load-bearing work concentrates in one person; a modernization plan implemented by the person it exists to relieve would deepen the very dependency it is meant to fix. The arrangement this plan is built around is a board-side sponsor for each phase — drawn from the engaged officers the assessment identified on both boards — paired with a staff coordinator holding the calendar and the tracking. An owner for deadlines, site-visit and audit timing, and meeting logistics is a gap staff specifically identified.

2. The Capacity Constraint

Every choice in this plan runs into one constraint, and the plan states it at the front rather than discovering it in month seven.

The assessment measured the constraint precisely. Staff describe the office as at capacity in matching language across independent interviews. Administrative processes draw the lowest operational rating in the staff survey. And the most telling finding of all: staff who have attempted to write procedures were defeated by the very workload those procedures would relieve. That is not a motivation problem, and no amount of encouragement addresses it. It is arithmetic. A plan that assumes found time will not survive contact with a single board cycle.

Three consequences follow, and they shape every item that follows.

First, self-implementation is not free. Its price is staff hours that do not currently exist as slack, which means each self-implemented item must either displace something else or be granted protected time by explicit decision. This plan states an effort estimate for every item so that trade can be made knowingly rather than by default — and so that a board asking "can we just do this ourselves?" has the number in front of it when it answers.

Second, unprotected self-implementation defaults upward. In an office of five single-occupant specialist roles reporting to one Executive Director who absorbs residual work by philosophy, any task assigned without protected time and a named owner will land on her. That is the Hero tax the assessment named, operating on the remedy instead of the problem. It is the most important sentence in this document: a modernization plan implemented casually would make the succession risk worse, not better, and it would do so invisibly, because the work would appear to be getting done.

Third — and this is the counterweight, and it is substantial — most of this plan genuinely is self-implementable, and several of its highest-consequence items cost almost nothing. Restoring the enforcement loop is a board decision, not a project. Calendar invitations are not a consulting engagement. Redirecting an existing compliance-tracking capability inward is a Tuesday afternoon. Most of the twenty-three items in this plan are work the organization can do itself, and among them are the two that would change the most. A plan that routed everything outward would be both wrong and useless to the people reading it.

What protection actually looks like

Wherever an item is carried internally, three specific things have to be true, because without them self-implementation is a wish rather than a path. Name the owner for each item — a person, not a role, and rarely the Executive Director. Put the time on the calendar in defended blocks, ahead of the work, rather than hoping for gaps between board cycles. And say out loud what gets deferred to make room, which is the step organizations skip and the reason these plans stall. If the boards cannot name what a self-implemented item displaces, that is useful information: it means the honest path for that item is facilitation, or a later phase.

One practical way to make that discipline real, rather than a paragraph everyone agrees with and nobody applies: model it once, in a working session with the staff and the phase sponsors, on a single item from Phase One. Name the owner, block the time on an actual calendar, and say out loud what

moves to make room. An hour spent doing it together is worth more than a page describing it, and it establishes the pattern the remaining twenty-two items depend on.

3. The Twenty-Four Month Arc

Four phases, each six months, each with a purpose that makes sense of the items inside it. The arc has a logic worth stating: it moves from decisions to documents to practiced capability to durability, and it front-loads the items that are cheap, fast, and visible — not to be easy, but because a first phase that delivers real change is what makes a board believe the second one is worth funding. The flywheel logic the assessment described applies to the plan itself.

Phase	Months	Purpose	Items
One • Foundation	1–6	Close the sharpest exposure, make the cheapest high-consequence repairs, and settle the two questions that shape everything after — accessibility standing and internal capacity.	8
Two • Architecture	7–12	Build the instruments that make Phase One durable — documentation, governance disciplines, the transition framework — and decide the platform's future.	7
Three • Capability	13–18	Convert documents into practiced capability: rehearsed backups, a real pipeline, development that is also continuity.	5
Four • Durability	19–24	Set the standing policies that keep this from eroding, and verify what changed.	3

The phases are not equally demanding. Phase One is mostly light and fast, and carries two decisions whose weight is out of proportion to their effort. Phase Two carries the plan's largest asks — the documentation program and the platform replacement. Phase Three is mostly scheduling discipline rather than new construction. Phase Four is thin by design, because a plan whose final months are crowded is a plan that has not left room for the ordinary business of two boards.

What the boards decide, and when

Twelve decision points sit inside the twenty-four months. Their timing is arithmetic rather than preference: each one either opens work that takes months to finish, or closes a window that does not reopen until the next annual cycle.

When	Decision	Why it sits here
Month 1	Adopt the plan; name a phase sponsor on each board and a staff coordinator	Without a named owner other than the Executive Director, the plan reproduces the finding it addresses
Month 1	Adopt the enforcement protocol (item 1.2)	Highest consequence, lowest cost, and the signal that this plan is real

When	Decision	Why it sits here
Month 2	Choose the path for financial-function documentation (item 1.3)	The first honest test of whether time can be protected; the answer informs every later choice
Month 3	Review the vendor's accessibility answer, the scan, and counsel's advice (item 1.7)	A long-standing staff concern finally gets a documented answer, in time to inform the platform choice
Month 4	Decide the internal-capacity question and its form (item 1.8)	The plan's pivot: it determines who carries the documentation, the platform work, and the analysis
Month 6	Choose the path and scope for the documentation program (item 2.1)	The plan's largest recurring commitment; needs deciding before Phase Two begins, not during it
Month 7	Decide the evaluation approach ahead of the annual cycle (item 2.2)	Must be settled before the cycle opens or it defaults to the existing practice for another year
Month 7	Settle the platform's scope and whether applicants must have accounts (item 2.7)	Both answers change which option wins; deciding them inside the evaluation rather than before it is how a comparison drifts to a foregone conclusion
Month 9	Select the platform path and, if replacing, the product (item 2.7)	Leaves room to build, test, migrate, and run in parallel through a full funding cycle inside the plan
Month 12	Mid-point review against the plan	The natural point to reorder later phases based on what the first year showed
Month 13	Fund leadership development support, if the floor is in place (item 3.4)	Sequenced after documentation and cross-training are underway, per that item's condition
Month 21	Commission verification and choose a provider (item 4.3)	Lead time for a scoped, independent re-score at the twenty-four-month mark

The platform selection at month nine sits earlier than its risk profile alone would suggest, and the reason is arithmetic rather than urgency. A replacement has to be built or configured, tested, migrated, and then run alongside the existing system through a complete funding cycle before anything is retired — and a funding cycle here runs a full year. Deciding in the plan's second year would push the parallel run past the end of the plan, which is how organizations end up cutting over mid-cycle. Whatever the accessibility answers in item 1.7 turn out to be, that timing logic holds on its own.

4. Phase One — Foundation

Months 1–6 · Eight items

This phase does three jobs. It closes the sharpest continuity exposure — an organization with no written interim authority and an undocumented financial function. It makes the governance repairs that cost almost nothing and change the most. And it settles two questions that shape everything after: where the applicant portal actually stands on the accessibility problems staff have been raising for years, and whether the organization is going to add the capacity to carry this plan. Most of these items require no outside help of any kind, and three could be completed within a single board cycle by decision alone. If the boards do nothing else from this plan, this phase is the part to do.

1.1 — Interim authority, made real

Answers: Executive Succession (Domain 10) — the sole written delegation is one sentence that has never been exercised. Report Cluster 1.

	Self-implemented	With external facilitation
The work	Officers and the Executive Director draft a one-page delegation instrument naming who holds which authorities during an unplanned absence — signing, payroll, board relations, external representation — reviewed by counsel and formally conferred by both boards.	A facilitator supplies comparable instruments from similar public bodies and drafts to them, which mostly saves search time rather than judgment.
Effort on the organization	Light. Roughly six to eight hours of drafting and counsel review, plus one board agenda item per board.	Light. Two to three hours of review.
What to watch	The temptation is to write it and file it. An instrument never exercised is the finding, not the fix — pair adoption with the rehearsal in item 3.1.	Little is gained. The hard content here is local — who actually does what — and it is already known inside the building.

1.2 — Adopt the enforcement protocol

Answers: Board Oversight (Domain 2) — staff-levied consequences are reversed, and the same problems recur each cycle. Report Cluster 2.

	Self-implemented	With external facilitation
The work	Each board adopts a short written protocol: when a funding-requirement consequence is triggered, the default is that it stands, and any reversal requires a recorded motion stating its reasons. Reviewed annually against the year's cases.	A facilitated board session on accountability practice, using the protocol as the working text.

	Self-implemented	With external facilitation
Effort on the organization	Light. A two-page draft, discussion, and a vote at each board — expect more than one conversation before it is adopted.	Light. One board session per board.
What to watch	The document is the easy part; the first hard case is the real adoption. Expect the protocol to be tested within two cycles, and treat that first recorded exception as the point where it either becomes real or does not.	Useful only if the boards want the conversation rather than the instrument. The instrument itself does not require help.

1.3 — Document the financial function

Answers: Key Staff Continuity (Domain 10) and Knowledge Management (Domain 6) — the financial function's only written support is an outdated county software manual. Report Cluster 1.

	Self-implemented	With external facilitation
The work	The Financial Manager writes a monthly-close checklist and a fiscal-activities calendar, working from established templates, in protected blocks over three to four months.	A facilitator interviews the Financial Manager across two or three sessions, drafts the procedures, and returns them for correction — shifting the role from author to reviewer.
Effort on the organization	Substantial. Roughly forty to sixty hours of the Financial Manager's time, plus review.	Moderate. Roughly ten to fifteen hours of the Financial Manager's time in interview and review.
What to watch	This is precisely the work the assessment found defeated by workload — attempted before, abandoned for lack of time. Self-implementation here is viable only with time genuinely protected in advance and something explicitly deferred to make room. Without that, this item will slip quarter after quarter.	The documentation must read in the organization's own terms, not a template's. Insist on the practitioner's language surviving into the final text, or the manual will be accurate and unused.

1.4 — Meeting mechanics and packet expectations

Answers: Board Engagement (Domain 2) — unread packets, emptied study sessions, an onboarding that no longer instills the habit of attending. Report Cluster 2.

	Self-implemented	With external facilitation
The work	Calendar invitations for every meeting and study session; a reminder several days ahead; a one-page decision summary at the front of each packet; and a stated purpose published with every study session agenda. A written attendance expectation adopted by each board.	Not applicable in any meaningful sense.

	Self-implemented	With external facilitation
Effort on the organization	Light. A few hours of setup, then minutes per meeting.	—
What to watch	Accounts differ on whether reminders reach members in a form they notice, which is itself the reason for calendar invitations. The board should set the expectation itself, so this reads as governance discipline rather than staff nagging.	—

1.5 — A staff-input channel with visible disposition

Answers: Culture & Leadership (Domain 8) — staff rate transparency of decision-making and staff input at 3.17; ideas surface and stall. Report Cluster 5.

	Self-implemented	With external facilitation
The work	A shared log in which any staff member records a suggestion, and against which the Executive Director records a decision and a reason within a stated window. Reviewed as a standing item at the existing post-meeting all-staff debrief.	A facilitated session to design the channel and set the norms around it, typically bundled with the culture work in Phase Three.
Effort on the organization	Light. Setup is under an hour; the ongoing cost is the discipline of answering.	Light. One session.
What to watch	The mechanism is trivial and the practice is not. What makes this work is that ideas receive an answer — including no, with a reason — and that credit is recorded where the idea originated. A log with unanswered entries is worse than no log.	Premature. Build the habit first; facilitation has more to work with in Phase Three if the habit has taken.

1.6 — Move organizational records out of personal accounts and individual folders

Answers: Knowledge Management (Domain 6) — core work product held in personally owned cloud accounts and in individual, unshared folders. Report Cluster 4.

Third path: an internal capacity role would own the migrated structure afterward, which neither column does. See item 1.8.

	Self-implemented	With external facilitation
The work	Inventory what organizational material sits in individually held accounts and in individual folders no one else can see, stand up organizationally owned storage with managed access through the existing IT arrangement, and migrate — crediting the practice being adopted rather than treating the migration as a correction.	An outside data-governance review of where records live and what policy should govern them.
Effort on the organization	Moderate. Roughly fifteen to twenty-five hours across staff and the IT vendor.	Light to moderate. Interviews and review.
What to watch	Migration is the easy half. The harder half is deciding what the organization's record actually is — which file is the official version, who holds access afterward, and how long each category is kept. Settle that before moving anything, or the new location inherits the old confusion.	Require a documented structure back, not just moved files. The value is in the organization knowing where things live afterward.

1.7 — Answer the accessibility question staff have been raising

Answers: Technology & Systems (Domain 6) — three staff independently named accessibility as an unresolved problem with the applicant portal, one having raised it for years. Report Cluster 4.

	Self-implemented	With external facilitation
The work	Three asks in one cycle, none of them a project. Ask the vendor in writing what accessibility standards the portal and the boards' other public sites are built and tested against and what documentation exists. Run a screening scan of the applicant-facing pages. Ask counsel to confirm what accessibility obligations apply to the boards. Fold in the vendor's written continuity terms — what happens to the code and the data — since it is the same conversation.	A qualified accessibility specialist tests the portal against whatever standard counsel identifies and returns a remediation list ranked by severity.
Effort on the organization	Light. Roughly six to ten hours, most of it waiting for answers.	Light. A few hours of coordination and review.

	Self-implemented	With external facilitation
What to watch	A screening scan finds only some of what matters and proves nothing on its own — treat a clean result as a reason to plan calmly, never as a conclusion. And the question of what legally applies belongs to counsel; neither staff nor this plan should attempt it.	Worth commissioning only after the scan and counsel's answer have scoped it. This is a specialist discipline, distinct from both organizational development and general information technology.

1.8 — Decide the internal-capacity question

Answers: *Organizational Design (Domain 6) and Key Staff Continuity (Domain 10)* — staff, asked what would help most, most often named added coordinating and technical capacity — two naming a specific role, the Executive Director among them, and two more putting systems and technology first. Report Cluster 4.

	Self-implemented	With external facilitation
The work	The boards price and decide the form: a dedicated knowledge-management, systems, and analysis position; a part-time or fixed-term appointment tied to this modernization period; contracted capacity; or a position shared with another county body. Whichever form, the role's first-year mandate is this plan, and its scope is built from functions transferred explicitly from named people rather than from overflow generally.	Outside help with role design, scoping, and the selection process.
Effort on the organization	Moderate to decide — roughly fifteen to twenty-five hours of scoping, costing, and board discussion. Substantially more to recruit and onboard if the answer is yes.	Light to moderate.
What to watch	Three ways this goes wrong. A role defined as general help absorbs overflow and relieves no one. A role reporting in a way that makes it one more thing the Executive Director manages adds supervisory load to the person it should unburden. And hiring into an organization with no documented procedures is hard — which argues for making the documentation the job rather than a prerequisite for it.	The decision is the boards' and the role design follows directly from this plan's own item list. What outside help would mostly supply here is a structured hiring process, which is worth having and is not the hard part.

The decision this plan turns on: whether the documentation program, the compliance calendar, the records migration, the platform work, and the portfolio analysis are carried by a person hired to carry them, by staff who currently have no hours, or by outside facilitation that leaves nothing behind. Deciding early matters more than deciding perfectly, because every later item inherits the answer. The boards may reasonably decline — the cost is real, the Developmental Disabilities

Board's rate headroom is thin, and adding administrative capacity while holding funded agencies to efficiency standards is a political act in a county relationship that is managed carefully. If they decline, they should say in the same meeting which items above they are prepared to let slip, because the capacity to carry all of them does not currently exist. A capacity question left unanswered resolves by default, and the default here is the Executive Director.

5. Phase Two — Architecture

Months 7–12 · Seven items

Phase One made decisions; this phase builds the instruments that keep those decisions from eroding. It carries the plan's two largest undertakings — documenting the organization's core functions, and deciding the applicant platform's future — along with the Executive Director evaluation, where the case for outside involvement is structural rather than practical. All three deserve the boards' attention early in the phase rather than late, because all three take months rather than meetings.

2.1 — The documentation program

Answers: Knowledge Management (Domain 6) — no internally authored procedure exists for any core function — and Culture (Domain 8): the office has no shared, written picture of its own operations against which anyone's memory can be checked. Report Cluster 4.

Third path: documentation needs maintaining every year after it is written — recurring work that compounds in a role rather than in an engagement. See item 1.8.

	Self-implemented	With external facilitation
The work	Adopt a common template and a schedule of one core function per month, each written by the person who performs it, in working sessions protected for the purpose. Target eight to ten procedures covering every key role within the year, and include the lightweight communications and engagement plan the report names — a one-page statement of how the boards show up and who owns it.	A facilitator interviews each role, drafts each procedure, and returns it for correction and sign-off, with the organization owning the template and the maintenance cycle afterward.
Effort on the organization	Major. Roughly eighty to one hundred and twenty hours across the staff, concentrated in five people who are already at capacity.	Substantial. Roughly thirty to forty hours across staff in interviews and review — a reduction of roughly two-thirds, and a shift from authoring to correcting.
What to watch	This is the plan's largest single ask and its most likely point of failure. Documentation written by people with no slack does not get written — the assessment established that empirically, in this office. If this path is chosen, the schedule must be short enough to finish and the protection must be real: a defended half-day per person per month, with a named alternative deferred.	Two risks. Procedures written from outside can drift into generic language that no one uses; require the practitioner's own terms to survive. And documentation produced without an owned maintenance cycle goes obsolete — which is exactly how the organization lost its previous documentation.

2.2 — Rebuild the Executive Director evaluation

Answers: Board Oversight (Domain 2) — an annual, officer-only formality, largely carried forward year to year, with no staff input and no follow-up on its own recurring feedback. Report Cluster 2.

	Self-implemented	With external facilitation
The work	Officers rewrite the instrument, add a structured staff-input step, set explicit annual goals including the delegation-support goal the boards have named for years, and calendar a mid-year check against those goals. Resume the quarterly president-director conferences the intergovernmental agreement already requires, with a standing agenda and in a form counsel confirms is consistent with the Open Meetings Act.	A third party collects and aggregates input from board members and staff, returns themes rather than attributable comments, and facilitates the officers' evaluation conversation. The boards retain the judgment and the decision entirely.
Effort on the organization	Moderate. Roughly fifteen to twenty-five hours of officer time, plus the evaluation cycle itself.	Light to moderate. Roughly ten hours of officer time plus brief staff participation.
What to watch	The instrument is not the binding constraint. The assessment found officers describing an exercise in which everyone wants to give a perfect score and nobody wants to raise anything difficult — and a board cannot redesign its way out of a dynamic it is inside. Staff input collected and compiled by the officers themselves will also be discounted by staff, in a six-person office where authorship is guessable.	Cost and cadence. This is worth doing well once and then repeating internally, rather than becoming an annual outside expense — build the boards' own capability through the first cycle.

2.3 — Board conduct code, conflict-of-interest practice, and the escalation route

Answers: Ethics Framework (Domain 9) — no board-specific conduct code (members receive the county's code of ethics and a 2012 counsel opinion at orientation, but nothing the boards have adopted governs member conduct), conscientious but undocumented conflict practice, no board-level training, and no escalation route for compliance or financial-integrity concerns that reaches past the Executive Director. Report Cluster 2.

	Self-implemented	With external facilitation
The work	Adapt a conduct code — or, if counsel maintains that a separate code is inadvisable, a short adopted statement of how the county's code applies to board service — and a disclosure-and-recusal protocol from established sector templates, adopt both by each board, add a brief annual training, and start a standing minute-book record of disclosures and recusals. In the same pass, reinforce the existing grievance procedure and add an escalation route for compliance and financial-integrity concerns that does not terminate at the Executive Director: confirm that the external route the current procedure names still exists, and add the state-level options counsel approves.	A facilitated board workshop that adopts the instruments and works through anonymized scenarios drawn from the kinds of conflicts these boards structurally encounter.
Effort on the organization	Moderate. Roughly fifteen to twenty hours of drafting and counsel review, plus adoption and an annual training slot.	Light. One session per board, plus review.
What to watch	Adopting a code is straightforward; the practice question is what happens the first time it binds someone in the room. Pair adoption with a plain statement of who administers it, so it does not default to the Executive Director — which is the current arrangement, and part of the finding. The grievance work is already under way with the State's Attorney's civil division; this item should absorb it rather than duplicate it.	A workshop without adopted instruments behind it is a conversation. Sequence the adoption first, then use the session for the practice.

2.4 — Board member orientation

Answers: Board Composition (Domain 2) — orientation works where the Executive Director performs it personally and thinly everywhere else; the purpose of the deliberative venue is not part of it. Report Cluster 3.

	Self-implemented	With external facilitation
The work	Assemble a board-owned orientation: a structured session, a service-system primer for each board, the governance essentials, an explanation of each meeting type and its expectations, and an assigned peer mentor for every new member.	A facilitator designs the orientation arc and the primer structure; the boards populate and deliver it.
Effort on the organization	Moderate. Roughly twenty to thirty hours to build, then a few hours per new member.	Light to moderate. Roughly ten hours of review and content supply.
What to watch	The trap is precise and worth naming: if staff build and deliver this, the finding reproduces itself — orientation remains something the Executive Director does rather than something the board owns. Assign an officer as author and host, with staff supplying content only.	Design and delivery separate here. A facilitator can build the arc; if the same facilitator delivers it, the boards have moved the dependency rather than removed it.

2.5 — The inward-facing compliance calendar

This is among the most visible items in the plan: it produces a single instrument the boards can see, hold, and check, out of a capability the organization already runs well in the other direction.

Answers: Regulatory Compliance (Domain 9) — a real compliance-tracking capability that points entirely outward at grantees and never inward at the boards' own obligations. Report Cluster 4.

Third path: a compliance calendar is kept, not built. The keeping is the work. See item 1.8.

	Self-implemented	With external facilitation
The work	Extend the existing grantee-tracking practice to the boards' own deadlines: training certifications, filings, insurance renewals, agreement renewals, policy reviews, and the annual evaluation and audit cycles — in one owned instrument with a named holder.	An outside compliance review that produces the calendar as a deliverable.
Effort on the organization	Light to moderate. Roughly ten to fifteen hours, because the capability and the format already exist.	Light. Interviews and review.
What to watch	Only that it needs an owner other than the person who already holds every other calendar. This is a natural first responsibility for the coordinating role described in item 1.8.	Buying what the organization has already proven it can build. The gap here is direction, not capability.

2.6 — The written transition framework

Answers: *Executive Succession (Domain 10) — board readiness for a transition is the lowest-rated item in the assessment. Report Cluster 1.*

	Self-implemented	With external facilitation
The work	Officers draft both faces of the framework: an emergency plan naming authorities, communications, and first-week decisions, and a planned-transition process covering search, overlap, and knowledge transfer. Adopted by both boards and reviewed annually.	A facilitator brings sector-calibrated frameworks and runs a working session with the officers of both boards to produce the document, with the boards deciding all content.
Effort on the organization	Moderate to substantial. Roughly twenty-five to forty hours of officer time across the phase.	Moderate. Roughly twelve to eighteen hours of officer time.
What to watch	Officer turnover during drafting, and the pull toward writing the easy half. The planned-transition process is the comfortable document; the emergency plan is the one that matters, and it is the one that tends to stay in draft.	A framework produced in a session and never rehearsed is paper. Whichever path is taken, the rehearsal in Phase Three is what converts it into readiness.

2.7 — Decide the applicant platform's future

Answers: *Technology & Systems (Domain 6) — a custom platform resting on two unverified external developers, unresolved accessibility concerns raised by three staff, and a system staff find not user-friendly. Report Cluster 4. Depends on items 1.7 and 1.8.*

Third path: a configured platform needs an administrator, not a project. See item 1.8.

Two questions come before the options, because both change which option wins and neither belongs inside the comparison. The first is what the replacement is actually replacing. Applicant intake is the obvious answer, but grantee reporting and the internal tracking of monitoring findings, corrective actions, and deadlines all run on separate footing today, and a configurable platform could hold all three. Scoping one system and scoping three are different decisions with different answers.

The second is whether applicants must have a genuine account they log into. Configurable platforms of this kind handle public submission well, but they generally do not give an applicant somewhere to return to — to review what was sent, finish something later, or follow a decision. Follow-up runs on emailed requests and shared links instead. At this volume that is workable, and it is a real step down if the current system already offers applicants more than that. Establish what applicants have today, and write down whether a logged-in portal is a requirement or a preference, before the evaluation rather than during it. If it is a requirement, that single answer points away from a low-code rebuild and toward a purpose-built product whatever the rest of the comparison shows.

	Self-implemented	With external facilitation
The work	With those two answers in hand, evaluate three options against written criteria rather than drifting into one. Remediate and stay, if item 1.7 shows the portal is in better shape than staff believe — cheapest, and it leaves the developer-succession risk untouched. Buy a purpose-built grants management product — a mature market, though most of it is designed for private foundations rather than statutory county funders running two boards, embedded cultural competence plans, and state waiting-list data. Or rebuild on a configurable low-code platform such as Quickbase or Smartsheet, which the boards would own and could change without waiting on anyone. Make accessibility an explicit selection criterion evidenced by each vendor's own conformance documentation rather than an assurance, applied before selection. Whichever way the evaluation leans, obtain a written quote from at least one purpose-built product and price the internal build against it, so the comparison rests on the boards' own figures rather than an assumption about which path costs less. Run the replacement in parallel with the existing system through at least one full funding cycle before retiring anything.	An independent requirements-and-options assessment covering the three paths, accessibility testing of the finalists, and support through migration planning.
Effort on the organization	Major, and it depends entirely on item 1.8. Evaluation and selection run roughly forty to sixty hours. A low-code rebuild is a project on the order of two hundred to four hundred hours of configuration, testing, migration, and parallel running across roughly nine months — which existing staff, on this assessment's evidence, do not have. Those figures describe the applicant system alone; scoping the other two functions into the same build adds to them, less than proportionally but not trivially, and the estimate should be rebuilt once the scope question is settled.	Moderate. Roughly twenty-five to forty hours across staff in requirements sessions and review.

	Self-implemented	With external facilitation
What to watch	Three risks, in order of likelihood. Building internally with no designated owner replaces two aging external developers with one internal builder, which is the same single-person dependency in better clothes — the safeguard is that the build belongs to a defined role with documented configuration, not to whoever is most enthusiastic. An accessible platform does not guarantee an accessible application: what gets built on it needs testing in its own right, before launch and after changes. And the current system does something genuinely useful that is easy to lose — the linked expense and revenue view that flags agency surplus and deficit is the kind of logic these rebuilds tend to under-scope.	Match the advisor to the question. This is grants technology, systems procurement, and digital accessibility — three specialisms, none of which is organizational development. The boards should source them accordingly rather than assume any single advisor covers all three.

6. Phase Three — Capability

Months 13–18 · Five items

The first year produces decisions and documents. This phase converts them into capability, which is a different thing: a backup who has never performed the function is not a backup, and a transition framework never rehearsed is a file. Most of the work here is scheduling discipline rather than new construction, which makes it lighter than Phase Two despite being the phase where the succession risk actually falls. If the platform rebuild from item 2.7 is under way, it runs across this phase in parallel — carried by the capacity decided in item 1.8, not by the people doing the work below.

3.1 — Rehearsed cross-training

Answers: Key Staff Continuity (Domain 10) — named single-person dependencies, and a claims function that has never once been run with a backup present. Report Cluster 1.

	Self-implemented	With external facilitation
The work	For each load-bearing function, name a backup, walk the procedure together once from the Phase Two documentation, then have the backup perform it live with the primary present. Repeat annually. Include a live exercise of the interim-authority instrument from item 1.1.	An outside party designs and observes the rehearsals, reporting on what the exercise surfaced.
Effort on the organization	Moderate. Roughly twenty to thirty hours across staff, spread over the phase.	Light to moderate.
What to watch	Scheduling is the whole difficulty — these sessions are the first thing dropped when a board cycle presses. Put them on the calendar for the year at the start of the phase, and treat a missed rehearsal as a reportable item rather than a scheduling detail.	Adds observation the organization can perform for itself. The exercise's value comes from doing it, not from being watched.

3.2 — The officer pipeline and appointment signaling

Answers: Board Leadership Pipeline and Composition (Domains 10 and 2) — no recruitment or preparation process, thin willing bench, no channel for signaling appointment needs. Report Cluster 3.

	Self-implemented	With external facilitation
The work	Identify and personally invite prospective officers months ahead of elections rather than calling for interest in the room; define each office in a one-page role description; hand every incoming officer a real transition file. Maintain a short skills-and-perspectives matrix and transmit it to the County Executive with every vacancy. Address the structural barriers the boards control, including meeting times that exclude working-age recruits.	A facilitated board-development session on recruitment and succession, with the matrix built in the room.
Effort on the organization	Moderate. Roughly fifteen to twenty-five hours of officer time, mostly conversations.	Light. One session.
What to watch	The work is relational and does not delegate well. Its natural owners are the engaged officers the assessment identified — who are also the people already carrying disproportionate load, so the ask should be specific and bounded rather than open-ended.	A session produces intent; the results come from the individual invitations afterward, which no facilitator can make.

3.3 — Individual development plans

Answers: Professional Development (Domain 5) — no development plans, mentoring, or pipeline; staff rate their growth path at 3.40. Report Clusters 1 and 3.

	Self-implemented	With external facilitation
The work	A short annual plan for each staff member naming one capability to build and one responsibility to grow into — written to double as continuity work, so development and cross-training fund each other rather than competing.	An outside structure for readiness assessment and development planning, with role-specific readiness discussed openly with each person.
Effort on the organization	Moderate. Roughly two to three hours per person annually, plus the Executive Director's time.	Light to moderate.
What to watch	The plans are easy to write and easy to abandon. Tie each one to a specific continuity assignment from item 3.1 so it has a reason to be revisited, and review them at a fixed point in the year.	More apparatus than a six-person office needs at this stage.

3.4 — Leadership development support for the Executive Director

Answers: Culture & Leadership (Domain 8) — an absorption pattern the boards have flagged annually without ever building support around it. Report Cluster 5.

	Self-implemented	With external facilitation
The work	Not genuinely available in this form. The boards can set the goal and fund the support; the development itself requires an outside partner of the Executive Director's choosing.	Executive coaching the Executive Director selects herself, focused on delegation and transparency, tied to the goals set in the rebuilt evaluation from item 2.2, over roughly six to twelve months.
Effort on the organization	—	Light on the organization. The Executive Director's time, and a board decision to fund it.
What to watch	The failure mode is well documented in this organization: an annual written instruction to delegate, with no support and no follow-up, repeated for years. Repeating it a further time is the one option certain not to work.	Two conditions decide whether this works. It must be her choice of partner, or it reads as discipline rather than investment. And the floor must exist first — documented procedures and trained backups from Phases Two and Three — because asking a leader to delegate into a vacuum is asking her to absorb.

3.5 — The portfolio outcome roll-up

Answers: Board Oversight and Outcome Measurement (Domains 2 and 4) — measurement architecture is strong, but the boards deliberate program by program with no portfolio view. Report Cluster 2.

Third path: portfolio analysis is a habit rather than a deliverable, and it repeats every funding cycle. See item 1.8.

	Self-implemented	With external facilitation
The work	Extend the cumulative outcome reporting already reaching board packets into a portfolio view: what share of funded programs met their targets, by board and by priority area, with trend over time. Reviewed at a fixed point in the funding cycle, ahead of allocation decisions.	Outside design of the reporting framework and its indicators.
Effort on the organization	Light to moderate. Roughly ten to twenty hours to build the first version, then minimal.	Light.
What to watch	Position it before allocation decisions rather than after, or it becomes a report rather than an input. Its value is that it gives the enforcement protocol from item 1.2 something to stand on.	The organization's measurement practice is one of its genuine strengths. This is theirs to build.

7. Phase Four — Durability

Months 19–24 · Three items

This phase is deliberately thin. Two boards have ordinary business to conduct, and a plan whose final months are crowded is a plan that has not left room for it. What sits here are the standing policies that keep the first eighteen months from eroding, plus the verification that tells the boards what actually changed.

4.1 — Fund-balance policy and the multi-year revenue outlook

Answers: Financial Health and Revenue Diversity (Domain 3) — reserve adequacy raised as a worry in both surveys, statutory rate ceilings that bind unevenly across the two boards. Report Cluster 6.

	Self-implemented	With external facilitation
The work	Each board adopts a written fund-balance policy — purpose, target range, drawdown rules — and the Financial Manager builds a rolling multi-year outlook of levy trajectory against each board's statutory ceiling, with particular attention to the board whose headroom is thin.	An outside fiscal-sustainability analysis producing the policy and the projection together.
Effort on the organization	Moderate. Roughly twenty to thirty hours, drawing on established public-finance templates and county tax data.	Light to moderate.
What to watch	The outlook is only useful if it is revisited. Fix it to a recurring point in each board's annual calendar rather than producing it once.	The expertise is largely in the building, and the county tax office holds the rest. What is missing is the assignment, not the capability.

4.2 — A written strategic horizon

Answers: Vision (Domain 1) — no written future state; every officer holds a sincere and unwritten aspiration. Report Section 6, Domain 1.

	Self-implemented	With external facilitation
The work	Fold the vision question into the boards' existing three-year planning cycle rather than treating it as a separate exercise: one study session per board devoted to the horizon, the aspirations already articulated in this assessment as the starting text, and a short written statement adopted alongside the next plan.	A facilitated planning process producing a vision and strategic framework across several sessions.
Effort on the organization	Moderate. Two study sessions and a drafting round.	Substantial. Multiple sessions and preparation across both boards.

	Self-implemented	With external facilitation
What to watch	Study-session attendance is the risk, which is why this item sits after the engagement remedies in Phase One have had eighteen months to take. Do not schedule it into an empty room.	Real value where a board wants a full planning process — and disproportionate to the gap identified here, which is a missing written statement rather than a missing strategy. The strategic direction itself was among the strongest findings in the assessment.

4.3 — Verification against this baseline

Answers: the plan itself — the boards commissioned an assessment to prepare for succession and modernization, and should be able to say at the end of twenty-four months what moved.

	Self-implemented	With external facilitation
The work	Self-score against the assessment rubric and re-run the two anonymous surveys, comparing to the 2026 baseline.	An independent re-assessment against the 2026 baseline — either a full reassessment or a lighter re-scoring focused on the domains this plan targets.
Effort on the organization	Light to moderate. Survey administration and a scoring discussion.	Moderate. Interviews, surveys, and a review cycle.
What to watch	Two limits, both real. Anonymity in a six-person staff is difficult to make credible internally, and self-scoring tends to reward effort rather than measure change. Useful as an internal check; not persuasive as an account to the county or the public.	Scope discipline. A second full assessment is more than most organizations need at twenty-four months; a targeted re-score of the domains this plan addresses answers the question at a fraction of the effort.

Appendix — Crosswalk to the Assessment's Recommendation Clusters

Every item in this plan traces to a recommendation cluster in the Organizational Health Assessment dated September 18, 2026, and every cluster is carried somewhere in these twenty-four months. The table below maps them in both directions.

Report cluster	Plan items	Completed by
1 • Continuity and succession	1.1 Interim authority · 1.3 Financial-function documentation · 2.6 Transition framework · 3.1 Rehearsed cross-training · 3.3 Development plans	Month 18
2 • Governance discipline	1.2 Enforcement protocol · 1.4 Meeting mechanics · 2.2 Evaluation rebuild · 2.3 Conduct code, conflict practice, and escalation route · 3.5 Portfolio roll-up	Month 18
3 • Onboarding and pipeline	2.4 Board orientation · 3.2 Officer pipeline and appointment signaling · 3.3 Development plans	Month 18
4 • Operating infrastructure and knowledge management	1.6 Records migration · 1.7 Portal accessibility question · 1.8 Internal-capacity decision · 2.1 Documentation program · 2.5 Compliance calendar · 2.7 Platform future	Month 12
5 • Culture and psychological safety	1.5 Staff-input channel · 2.2 Evaluation rebuild (staff input) · 3.4 Leadership development support	Month 18
6 • Financial horizon	4.1 Fund-balance policy and revenue outlook	Month 24
Domain 1 • Vision	4.2 Written strategic horizon	Month 24
Verification	4.3 Re-assessment against the 2026 baseline	Month 24

The clusters do not complete in their numbered order, and the departure is deliberate: the plan interleaves them so that each phase carries a mix of quick wins and durable construction. A phase composed entirely of hard items produces no visible progress for six months, which is how modernization programs lose their sponsors.

Kim Bowdry,

Associate Director for Intellectual & Developmental Disabilities

Staff Report – October 2026

CCDDB/CCMHB:

I cloned the Program Year 2027 1st Quarter programs and claims in the Online Reporting System. The cloning of programs and claims allows for agencies to report claims for the Program Year 2027 2nd Quarter.

I completed the compilation of the Program Year 2026 Performance Outcome Reports into one document. This document can be found in the Downloadable Files section of the Champaign County (Illinois) Mental Health Board (CCMHB) and Developmental Disabilities Board (CCDDB) Registration, Application, and Reporting System site (<https://ccmhddbrds.org>) and on the CCDDB/CCMHB page of the Champaign County website (https://www.champaigncountyil.gov/MHBDDB/PDFS/PY26_IDD_POR_Combined_Report.pdf).

Program Year 2027 1st Quarter Reports are due on October 28, 2026. Any agency in need of an extension should complete the 'Request for Extension of CCDDB-CCMHB Report Deadline' form prior to the deadline. Ms. Howard-Gallo emailed a quarterly report due date reminder to funded agencies on October 2, 2026.

I emailed the 'DRAFT CCDDB Three Year Plan 2026 – 2028 with draft FY2027 Objectives and Tactics' and 'Allocation Priorities and Decision Support Criteria for Program Year 2028' documents to stakeholders for feedback.

I have started downloading all Program Year 2026 claims from the Online Reporting System. Claims will be sorted by program and client. Through review of this data, I can see duplication of services and client specific program involvement. An overview of how services are utilized will be provided prior to the next application review.

I met with representatives from UIUC School of Social Work and the University of Illinois Leadership Center regarding continuing the collaboration to offer training to agency providers.

I created the 'Utilization Summaries for Program Year 2026 CCDDB and CCMHB I/DD Programs' document. This is included in the October 2026 CCDDB Packet and [posted in the Downloadable Files section](#) of the CCMHB/CCDDB website. This document also reports on the Outcomes that were identified in each Program's application for Program Year 2026.

I participated in the October meeting with CCDDB/CCMHB staff and staff from the Family Resiliency Center, related to the Evaluation Capacity project.

I added captions to the September CCDDB and CCMHB Meetings and the Joint Study Session. All meeting recordings were then uploaded to the CCDDB/CCMHB YouTube Channel. Please visit the CCDDB/CCMHB YouTube Channel to [view the recordings](#) (<http://www.youtube.com/@champaigncountymhbandddb>).

I created the CCDDB/CCMHB Newsletter for October. The November Newsletter is in progress and will be sent out in early November. Any information to be included in the November

Newsletter should be [emailed to me \(kim@ccmhb.org\)](mailto:kim@ccmhb.org) by October 23, 2026. You can [sign up for the CCDDb/CCMHB newsletter here](#). I also created PDF versions of each newsletter for records retention.

I reviewed Board Meeting Minutes from each Board's previous monthly meetings and the September Study Session.

Site Visits:

I have completed site visits for all I/DD programs funded by the CCDDb and CCMHB. Associate Director Bryson and Operations and Compliance Coordinator Howard-Gallo accompanied me on site visits. No concerns were noted during any of the site visits. Site Visit Reports for each program will be finalized, shared with agency representatives, and filed.

Illinois Department of Human Services - Division of Developmental Disabilities IDHS-DDD:

Beginning in October 2026, the Illinois Department of Human Services (IDHS) Division of Developmental Disabilities (DDD) will officially observe Disability History Month. This annual recognition highlights the history, advocacy, experiences, and contributions of people with disabilities. It offers a dedicated time to reflect on how people with disabilities have fought for their and other people's rights and led historic movements impacting history and access to services for many. This observance highlights our commitment to understanding that history shapes the rights and system of support we protect today and the importance of protecting those rights going forward.

In support of this new annual recognition, [Governor JB Pritzker has issued a proclamation](#) formally declaring October as Disability History Month in Illinois.

Governor Pritzker also [declares October 2026 as National Disability Employment Awareness Month](#) in Illinois.

Contract Amendments:

I prepared contract amendments for CCRPC – Community Services Decision Support PCP and Head Start/Early Head Start – Early Childhood Mental Health Services to update addresses as CCRPC is moving from Brookens in October 2026.

Learning Opportunities:

Navigating Multicultural Organizations is scheduled for November 18, 2026, from 9:30-10:30AM at the Champaign Public Library. Making Strategic Decisions was held on September 16, 2026 and Addressing Conflict in Teams was held on October 14, 2026, both were held at the Champaign Public Library. This Leadership Training Series is a collaboration of CCDDb/CCMHB, the Illinois Leadership Center, UIUC School of Social Work, Community Foundation of East Central Illinois, and United Way of Champaign County.

Please [register here](#) to join (<https://socialwork.illinois.edu/2026/02/03/foundations-of-effective-leadership-training-series/>).

I met with representatives from each of the organizations collaborating on this project in early October to discuss a continuation of this project. After the training series concludes in December, we will meet again to develop a plan and timeline for moving forward with the project again during 2027. The training series is likely to be offered again in the late spring/early summer.

I am coordinating with Head Start/Early Head Start staff to host a workshop at the Champaign Public Library in the coming months.

[DISABILITY Resource Expo:](#)

After organizing information for the updated Disability Resource Expo Guidebook, I received some additional updates from a few agencies. This information was updated on the internal document and then shared with our contracted Social Media expert who is organizing and compiling it for the updated Disability Resource Expo Guidebook. The updated Disability Resource Expo Guidebook will be printed at the end of 2026 and distributed during 2027.

[Mental Health and Developmental Disabilities Agencies Council \(MHDDAC\):](#)

I participated in the September and October MHDDAC meetings.

[Association of Community Mental Health Authorities of Illinois \(ACMHAI\):](#)

I participated in the October ACMHAI Executive Committee meeting. The I/DD Committee is scheduled to meet again on November 10, 2026. Representatives from Community Choices and DSC will provide a presentation on the LEAP Program to the I/DD Committee.

[National Association for County Behavioral Health and Developmental Disability Directors \(NACBHDD\):](#)

I participated in the I/DD Committee meeting on October 13, 2026.

[Champaign County Transition Planning Committee \(TPC\):](#)

The TPC hosted its first meeting of the new school year on September 11, 2026. The group discussed the upcoming school year, the 2026-27 meeting schedule, and upcoming events.

[Champaign County Community Coalition Race Relations Subcommittee:](#)

The 4th Annual Black Mental Health and Wellness Conference was held on September 26, 2026. The Race Relations Subcommittee meeting was canceled in September. Meetings will resume in October.

[Other:](#)

Other time was spent reviewing documents for accessibility. I also attended several webinars.

Leon Bryson, Associate Director for Mental Health & Substance Use Disorders Staff Report-October 2026

For the month of September and part of October, I spent a significant amount of time evaluating and organizing agency quarterly data for the compiled PY26 Utilization Summary Report. There are a handful of agencies who are still updating their data, so these summaries will be included in the November Board packet. In addition, I set aside time to compile agencies' PY26 Performance Outcome Reports (POR). The PY26 PORs will be available via ccmhddbrds.org.

Also, an email was sent out to various stakeholders soliciting feedback on the draft version of proposed Allocation Priorities and Decision Support Criteria for Program Year 2028 (July 1, 2027 to June 30, 2028) for the Champaign County Mental Health Board. In November, the Board will review the finalized version of this document.

Agency Progress Reports: Agency PY27 first quarter Program Service Activity and financial reports are due by 11:59pm CST on October 28, 2026. A reminder about the reporting deadline and the procedure for requesting extensions was circulated by Ms. Stephanie Howard-Gallo to the agencies involved. The first quarter Program Activity/Consumer Service reports will be included in the upcoming board packet for the November 18th meeting.

Agency Presentation: CLC Coordinator Summerville and I have been working closely with the leaders of Don Moyer Boys and Girls Club's Community Coalition Summer Initiative program who will share their work with the board about the ways program are helping young people build confidence, develop skills, strengthen relationships, overcome challenges, and envision a positive future for themselves and their communities. This packet includes a conversation outline for you to review.

Site Visits: I worked alongside Associate Director Bowdry and conducted site visits with CCRPC Head Start/Early Head Start and DSC's Community Living and Family Development programs. Each site visit includes a discussion with the Program Director and appropriate staff members about the program's efficacy, as well as a review of client records and service utilization data. Upon request, the program directors and their teams supplied all essential supporting documents.

ACMHAI Committee Meetings: I was out of the office the day of the Legislative Committee meeting.

CCMHDDAC Meeting: On September 22nd, there were no agency presentations. Committee members provided updates. The next meeting is scheduled for October 21st via zoom.

CIT Steering Committee: I attended the October 7th meeting via zoom. Members provided updates about the various matters within their agencies. There was some extended discussion around the use of emergency hospital and police petitions and the difference between the two in assisting individuals who need urgent help. The fundamental difference lies in who establishes the initial custody and the exact legal paperwork required when the person arrives at the hospital.

Continuum of Service Providers to the Homeless (CSPH): On October 6th, members were presented with several presentations from subcommittee members. Bridget from Homebase provided members with an update on their strategic plan. Katie Harmon of Courage Connection discussed their services. Jazmine Hernandez from Strides will give a presentation at next month's meeting.

Evaluation Capacity Committee Team: I attended the monthly meeting with the Evaluation Capacity project team. Dr. Rachel Jackson informed us via email that she had pursued other professional prospects. I provided Dr. Jacinda Dariotis and Dr. Virnaliz Jimenez some agency program performance data when they began working with a new group of MHB agencies.

Rantoul Service Provider's Meeting: Members delivered agency updates at the meeting on September 21st. More agencies are attending the meetings, which is increasing and /or identifying the pooled resources in Rantoul.

SOFTT/LANS Meeting: I was out of the office on the day of the meeting on September 15th (a new meeting time and day for the committee).

Other Activities: On October 8th & 9th I attended the Beyond Borders: Global Collaborations for Mental Health Research and Services Conference. Sessions were virtual. Coinciding with World Mental Health Day, the theme is: Building Resiliency. This two-day virtual conference brought together leaders, researchers, practitioners, and people with lived experience from the local Champaign-Urbana community and around the world.

Stephanie Howard-Gallo

Operations and Compliance Coordinator

Staff Report – October 2026 Board Meeting

SUMMARY OF ACTIVITY:

First Quarter Reporting 2027:

First quarter financial and program reporting will be due on Wednesday, October 28th. I sent them a reminder of the deadline on October 2nd, as well as an extension request form if needed.

Audits:

On August 18th and again on September 18th, I sent a reminder to the agencies that their contract with us requires they will share documentation of the date their CPA firm began its work on the audit, review, or compilation. Four agencies responded. Most audits will be due December 30th.

Site Visits:

I accompanied Kim Bowdry on two site visits for three programs at DSC in September. I reviewed client files and sent any findings to Kim for the final reports. Site visit reports are available to Board members by request.

Other Compliance:

I sent emails to the funded agencies reminding them of their contractual obligation to send us their approved Board minutes either monthly or quarterly.

Trainings:

I completed Cybersecurity Awareness Training as required by Champaign County.

Other:

- Prepared meeting materials for CCMHB/CCDDB regular meetings and study sessions/presentations.
- Attended meetings for the CCMHB/CCDDB.
- Composed minutes for the CCMHB/CCDDB meetings.

October 2026

Staff Report- Shandra Summerville

Cultural and Linguistic Competence Coordinator

CCMHB/DDB Cultural Competence Requirements for Annual CLC Plans connected to National CLAS (Culturally and Linguistically Appropriate Services) Standards

Annually for submitting CLC Plan with actions supporting the National CLAS Standards. Cultural Competence is a journey, and each organization is responsible for meeting the following requirements:

- 1. Annual Cultural Competence Training-** All training related to building skills around the values of CLC and ways to engage marginalized communities and populations that have experienced historical trauma, systematic barriers to receiving quality care. Each organization is responsible for completing and reporting on the training during PY25/26
- 2. Recruitment of Diverse backgrounds and skills for Board of Director and Workforce-** Report activities and strategies used to recruit diverse backgrounds for the board of directors and workforce to address the needs of target population that is explained in the program application.
- 3. Cultural Competence Organizational or Individual Assessment/Evaluation-** A self-assessment organizational should be conducted to assess the views and attitudes towards the culture of the people that are being served. This also can be an assessment that will identify bias and other implicit attitudes that prevent a person from receiving quality care. This can also include client satisfaction surveys to ensure the services are culturally responsive.
- 4. Implementation of Cultural Competence Values/Trauma Informed Practices-** The actions in the CLC Plan will identify actions that show how policies and procedures are responsive to a person culture and the well-being of employees/staff and clients being served. . This can also show how culturally responsive, and trauma informed practices are creating a sense of safety and positive outcomes for clients that are being served by the program.
- 5. Outreach and Engagement of Underrepresented and Marginalized Communities** defined in the criteria in the program application.
- 6. Inter-Agency Collaboration-** This action is included in the program application about how organizations collaborate with other organizations formally (Written agreements) and informally through activities and programs in partnership with other organizations. Meetings with other organizations without a specific activity or action as an outcome is not considered interagency collaboration.
- 7. Language and Communication Assistance-** Actions associated with CLAS Standards 5-8 must be identified and implemented in the Annual CLC Plan. The State of Illinois requires access an accommodation for language and communication access with qualified interpreters or language access lines based on the client's communication needs. This includes print materials as assistive communication devices.

(Source: [Think Cultural Health](#))

Agency Cultural and Linguistic Competence (CLC) Technical Assistance, Monitoring, Support and Training for CCMHB/DDB

Agency Monitoring and Site Visits

CLC Support:

- CCRPC-Met with Jessie Hecken Mueller
- Community Coalition preparation for the Board presentation
- Community Choices- Board CLC Training

Anti-Stigma Activities/Community Collaborations and Partnerships

ACMHAI: I attended the following meetings and will attend upcoming meetings for ACMHAI-

Executive Committee Meeting- October 8

Engage Illinois- Reviewed Recording of the Engage Illinois Webinar

Children's Behavioral Health Committee – September 29, 2026

We also are looking at the trend in Children's Behavioral Health with the use of AI in Mental Health Treatment for youth.

[AI use surging for Mental Health Help among young people](#)

The Illinois State Board of Education has released guidance on Universal Mental Health Screening. This process is scheduled to be implemented in the school year 2027-2028. This is being implemented to serve as strategy to have an “early identification check” to connect young people with the appropriate support before mental health challenges escalate.

<https://www.isbe.net/Documents/Universal-Mental-Health-Screening-Guidance.pdf>

Illinois Children's Healthcare Foundation

I attended Mapping the Future conference on September 17, 2026. There were over 150 partners across the state of Illinois including behavioral health, advocates and youth/family partners. Here is the link to all the presentations from the conference:

<https://ilchf.org/mapping-the-future/>

Beyond Borders Global Mental Health Conference October 2027

“This conference aims to create a collaborative space where people with lived experience, caregivers, community members, artists, advocates, service providers, traditional healers, and researchers can learn from one another. We encourage proposals that connect ideas to practice and highlight voices that are often left out of global mental health conversations.

The theme of this year’s conference is **Building Resiliency**. We are interested in both creative and critical ideas about how people, communities, and systems stay strong and support wellbeing during hard times. Submissions may focus on research, professional practice, teaching, policy, or personal and community experiences. This conference will be held online.

I attended workshops and facilitated workshops on Friday October 9, 2026.

Champaign Community Coalition

I attended the Champaign Community Coalition for August and September. They meet on the 2nd Wednesday of each month. The highlights included information on the Community Coalition Summer Initiative Program: YES Program. There was also information about the Black Mental Health Conference, and a Presentation from the League of Women Voters, and the Non-Profit Leadership Series.



**Champaign County
Mental Health Board
Statement of Activities**

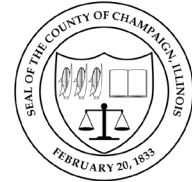


REVENUES	ACTUAL JAN-SEP 2025	ACTUAL JAN-SEP 2026	% OF ANNUAL BUDGET 2026	ANNUAL BUDGET 2026
Prop Taxes – Current	-3,457,955.84	-6,341,415.28	93%	-6,849,360.00
Prop Taxes – Back Tax	0.00	-334.74	17%	-2,000.00
Payment in Lieu of Taxes	-450.80	-407.23	20%	-2,000.00
Mobile Home Tax	0.00	-3,327.98	79%	-4,200.00
Other Intergovernmental	-334,575.00	-79,984.00	17%	-479,902.00
Investment Interest	-9,016.45	-10,920.78	22%	-50,000.00
Gain/Loss on Sale of Investment	0.00	-1,382.87	100%	0.00
Gifts and Donations	-1,050.00	-100.00	10%	-1,000.00
Other Misc Revenue	-31,495.17	-20,162.00	92%	-22,000.00
TOTAL REVENUES	-3,834,543.26	-6,458,034.88	87%	-7,410,462.00

EXPENDITURES	ACTUAL JAN- SEP 2025	ACTUAL JAN- SEP 2026	% OF ANNUAL BUDGET 2026	ANNUAL BUDGET 2026
Personnel	371,829.55	381,327.62	70%	542,105.00
Fringe Benefits	80,099.82	90,522.96	44%	203,650.00
Stationary & Printing	791.71	0.00	0%	4,000.00
Office Supplies	2,379.09	547.73	18%	3,000.00
Books & Periodicals	0.00	0.00	0%	200.00
Postage, UPS, FedEx	771.52	601.32	30%	2,000.00
Food (Non-Travel)	1,142.52	386.60	19%	2,000.00
Uniforms & Clothing	0.00	0.00	0%	750.00
Dietary Non-Food Supplies	109.93	50.38	20%	250.00



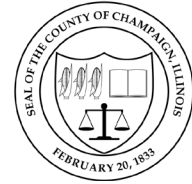
Champaign County
Mental Health Board
Statement of Activities



EXPENDITURES	ACTUAL JAN- SEP 2025	ACTUAL JAN- SEP 2026	% OF ANNUAL BUDGET 2026	ANNUAL BUDGET 2026
Equipment Less Than \$5000	2,998.57	3,161.09	38%	8,400.00
Operational Supplies	19.89	375.22	14%	2,750.00
Employee Development & Recognition	0.00	0.00	0%	200.00
Professional Services	156,663.33	132,951.12	63%	210,000.00
Outside Services	7,033.50	1,963.50	18%	10,800.00
Travel Costs	3,656.63	3,891.29	65%	6,000.00
Conferences & Training	650.00	910.00	30%	3,000.00
Training Programs	0.00	1,611.65	32%	5,000.00
Insurance (Non-Payroll)	5,285.00	6,289.00	27%	23,000.00
Rent	21,962.42	22,750.32	52%	43,500.00
Finance Charges & Bank Fees	0.00	298.47	995%	30.00
Advertising & Legal Notices	500.00	452.80	5%	10,000.00
Dues, Licenses, & Memberships	16,969.99	18,410.99	92%	20,000.00
Operational Services	1,843.55	10,291.20	69%	15,000.00
Public Relations	25.00	15,000.00	100%	15,000.00
Contributions & Grants	4,098,332.00	4,669,527.00	75%	6,246,827.00
Repair & Maint - Equip/Auto	0.00	111.20	11%	1,000.00
Repair & Maint – Building	0.00	0.00	0%	1,000.00
Attorney/Legal Services	0.00	0.00	0%	1,500.00
Equipment Lease/Rent	1,592.48	527.22	21%	2,500.00
Software License & SAAS	11,340.03	11,653.77	83%	14,000.00
Phone/Internet	1,482.79	501.52	17%	3,000.00



Champaign County
Mental Health Board
Statement of Activities



EXPENDITURES	ACTUAL JAN- SEP 2025	ACTUAL JAN- SEP 2026	% OF ANNUAL BUDGET 2026	ANNUAL BUDGET 2026
Transfers Out	0.00	0.00	0%	-10,000.00
<i>TOTAL EXPENDITURES</i>	<i>4,787,479.32</i>	<i>5,374,113.97</i>	<i>73%</i>	<i>7,390,462.00</i>



Champaign County
Mental Health Board
Estimated Fund Balance Report



ESTIMATED CCMHB FUND BALANCE	2025	2026
January	3,349,429	4,025,951
February	2,891,123	3,497,182
March	2,387,595	2,955,869
April	1,969,892	2,408,777
May	1,477,938	2,246,861
June	4,465,315	1,202,559
July	3,868,912	4,112,498
August	3,375,348	3,512,128
September	2,877,352	5,624,229
October	5,020,905	
November	3,881,146	
December	4,520,888	
EOY	4,520,897	

Board to Board Liaison Options

The Champaign County Mental Health Board (CCMHB) has a tradition of liaison relationships with the agencies they currently fund. Other community collaborations have been added to the list. Board members are welcome to visit any agency board meeting, which can be arranged by contacting Stephanie Howard-Gallo (stephanie@ccmhb.org).

Agency Board Meetings:

Champaign County Children's Advocacy Center – 4th Thursdays at 9:00 a.m.

Champaign County Christian Health Center – last Saturdays at 10 a.m.

Champaign County Health Care Consumers – 4th Thursdays at 6 p.m.

Champaign County Regional Planning Commission – Community Services and Head Start – last Fridays.

Community Service Center of Northern Champaign County – 3rd Thursdays at 4:30 p.m.

Courage Connection – 4th Mondays at 5:30 p.m.

Crisis Nursery – 2nd Wednesdays at 5:30 p.m.

CU at Home – 4th Wednesdays at 8:00 a.m.

CU Early – Unit 116 meetings.

Cunningham Children's Home – quarterly.

Don Moyer Boys and Girls Club – 3rd Tuesdays at 7 a.m.

DSC – 4th Thursdays at 5:30 p.m.

ECIRMAC (The Refugee Center) – 2nd Tuesdays at 4 p.m.

Family Service of Champaign County – 2nd Mondays at Noon.

FirstFollowers – 3rd Fridays at 5 p.m.

Greater Community AIDS Project – 2nd Tuesdays at 5:30 p.m.

GROW in Illinois – last Mondays at 7 p.m.

Immigrant Services of CU – 4th Thursdays at 6 p.m.

Promise Healthcare – 4th Tuesdays at 6 p.m.

RACES – 3rd Thursdays at 6 p.m.

Rosecrance Central Illinois – last Tuesdays at 4:30 p.m.

Uniting Pride – 2nd Wednesdays at 6:30 p.m.

Urbana Neighborhood Connections Center - ?

WIN Recovery – 2nd Mondays at 5:30 p.m.

Collaborations:

Champaign County Community Coalition – 2nd Wednesdays at 3:30 p.m.

Community Health Plan Steering Committee and Priority Workgroups – various.

Disability Resource Expo Steering Committee and Workgroups – to be determined.

Student Mental Health Collaboration – 1st Mondays at 11 a.m.