

Annual Report Guidelines

Commission Meeting

May 23, 2024

By: Martha E. Dominguez-Brinkley, PhD, CLC, MCHES

Deputy Director





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Key Areas to Discuss:

- Annual Reporting Process Background
- Current Content
- Revisions and Future Changes

Annual Report: Quality Assurance and Improvement

Result-Based Accountability



Report Refinement

- Clear Call to Action
- Context Setting
- Strategy
- Operations and Governance
- Financial Accountability
- Scanability
- Dissemination

Listening Sessions

- January 2024, February 2024, May 2024 – and, more to come...

Trainings of AR Guidelines

- July and August 2024

Review of all Data

- Multifaceted approach

Recommendations of Improvement Areas

- Tell F5CA Story and highlight Investments

Make AR Guidelines Updates

- Potential Date: May 2025

Annual Report

- Mandated in Prop 10 Statute
- Purpose:
 - Accountability
 - Describe Prop 10 Implementation
 - Report on investment outcomes
 - Share research and evaluation
 - Tell the F5CA story
- Key Audiences:
 - Legislature
 - Governor
 - County Commissions
 - Stakeholders



Annual Report Guidelines

- Updated and released annually, in advance of the Reporting Period (Fiscal Year)
- Defines Revenue and Expenditure categories
- Specifies demographic reporting details, evaluation information, and county highlights



Annual Report – Timeline

Reporting Period	Guidelines Approved and Ready	AR Data Due By	AR Data Analyzed, Report Completed	Planned Updates
FY 22-23	May 2022	Nov. 1, 2023	Jan. 2024	<ul style="list-style-type: none"> • Minor technical updates • Updated format of final report
FY 23-24	April 2023 Revisions: May 2024	Nov. 1, 2024	Jan. 2025	<ul style="list-style-type: none"> • Minor technical updates • Integrates SPCFA APR into AR data collection
FY 24-25	May 2024	Nov. 1, 2025	Jan. 2026	<ul style="list-style-type: none"> • Updates to race/ethnicity data collection/reporting

SPCFA Feedback

Twenty-one counties encounter data challenges.

F5CA explored a leaner reporting process and structure.

Held Listening Sessions:

- January 16, 2024, and February 29, 2024

Without harming the fidelity of the data, F5CA made technical and operation updates.

SPCFA Grantees will see updates in the AR Portal for FY 23-24.

SPCFA APR into AR Portal

- Fiscal Year 24–25
- Streamlines data entry for SPCFA Grantees (21 Counties)
- New tab in AR3 with qualitative questions (*3 narratives*) aligned with current SPCFA RFA requirements
 1. Key Program Accomplishments
 2. How Resources for COVID-19 Recovery were leveraged
 3. How funding is being maximized and leveraged
- Optional indicator of funding level for programs (fully, partially, or not funded with SPCFA)

All 21 Counties appreciated how F5CA made technical updates and streamlined their reporting efforts.

Race/Ethnicity Data Collection/Reporting

- Fiscal Year 24–25
- Updated to reflect recent Federal guidelines for demographics
- Select all that apply
 - Added “**or Latino**” to the *Hispanic* category
 - Added “**or Pacific Islander**” to the *Native Hawaiian* category
 - Added **Middle Eastern or North African** category
- Participants should **self-identify**

Thank you!

Special thanks to Dr. Amanda Lawrence!

