

# Local Health Department Annual Reports

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*Best Practices Guide*



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**Note on language:** When this guide references board of health (BOH) this term encompasses any type of local governing body the health department may interact with when submitting their annual report. This includes, but is not limited to, a health and human services board, county board, and city council.

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## Introduction

Annual reports play an important role in providing information to a local governing entity and the public. In many sectors, annual reports provide an opportunity to communicate the success of your health department and its financials in a clear, balanced, honest, and visual way. The annual report is an essential tool used by organizations to:

- Build trust through transparency.
- Expand the understanding of health.
- Mobilize people and resources.
- Paint a picture of accomplishments toward the agency’s mission, vision, values, and goals.

The Wisconsin Department of Health Services (DHS) does not prescribe the content or format for local health department annual reports. This document outlines best practices observed in annual reports from diverse jurisdictions across Wisconsin. Examples have been chosen because they display characteristics that include transparency, accountability, accessibility, and visual presentation of information. Local health departments (LHDs) may want to consider these examples when developing their annual reports.

## Local requirements and needs

Ultimately, your agency will decide...	Therefore, you may want to ask...
The purpose of your annual report.	<ul style="list-style-type: none"> <li>❖ Is it a tool to communicate the value of the health department?</li> <li>❖ Is it an internal document to report to the governing body?</li> <li>❖ Does it serve as a budget justification resource?</li> </ul>
To whom you want or need to communicate and how you will communicate the information.	<ul style="list-style-type: none"> <li>❖ Can the report serve multiple functions and be shared with multiple audiences?</li> <li>❖ Do you create a few different reports with varying levels of detail based on the audience?</li> </ul>
The best document type to share your health department’s impact.	<ul style="list-style-type: none"> <li>❖ How does your board of health want to see the information?</li> <li>❖ How does the community want to see the information?</li> </ul>

The value your LHD generates from the work to create and share your annual report is more important than conforming to a specific template or normative requirement. The suggestions below are only helpful if they generate value and are allowable based on jurisdictional requirements and needs.

## How to use this resource

Best practice characteristics are organized by topic. Click on a topic to find suggestions, considerations, and examples to use in developing your annual report. These best practices were developed from national resources, subject matter expertise, and what other Wisconsin health departments are doing.

If you would like to suggest further examples of best practice in LHD annual reports, please contact [Matthew M. Collie](mailto:matthew.collie@dhs.wisconsin.gov) ([matthew.collie@dhs.wisconsin.gov](mailto:matthew.collie@dhs.wisconsin.gov)).

## Legal

There are various submission requirements in Wisconsin regarding annual reports.

### Board of health

[Wisconsin Stat. § 251.06\(3\)\(h\)](#) states what is required of annual reports: "... The local health officer shall submit an annual report of the administration of the local health department to the local board of health." The language is light on standards. As such, it is suggested LHDs create annual reports that meet the needs of their department or community. Completing an annual report to meet a standard creates a report that likely will not be used. Completing a report that has a purpose for the LHD, BOH, and/or the local community better fulfills the requirement.

### Department of Health Services

Local health departments are required to submit their annual reports to DHS by May 1. The following wording of [Wis. Admin. Code § DHS 140.04\(2\)\(a\)](#) has prompted questions from LHDs: "...By May 1, a copy of the annual report submitted by the local health officer during the previous year..." The wording could be read such that "during the previous year" means the annual report provided to the BOH during the previous calendar year. If a LHD does not start working on their 2023 annual report until after January 1, 2024, then the report sent to the BOH in calendar year 2023 is likely the report regarding the activities of calendar year 2022.

Completing an annual report for the preceding calendar year (for example, 2023) after May 1 (for example, 2024) potentially diminishes the benefit of an annual report to the BOH and the community. DHS advises LHDs that it better serves LHDs, BOHs, DHS, and the local community if LHDs target to complete the previous calendar year's annual report before May 1. In other words, target completing the 2023 annual report before May 1, 2024. Then submit to DHS that annual report after it has been submitted to the local governing body.

### Local jurisdiction

Consider whether there are additional jurisdictional requirements beyond what is required in Wisconsin state statute and administrative code.

## Audience

The audience for your annual report is the people or groups you want to read and use the report. Knowing your target audience before creating your report is vital since every audience has different levels of public health knowledge, interest in the work of the health department, and learning styles. Your annual report may have one or multiple audiences with one or a few different versions of the annual report. An annual report focused on a specific audience may help you communicate and build a relationship with that audience(s).

The Public Health Communications Collaborative has created a communications tool on writing in plain language, about public health, that provides a quick two-page primer on how to define your audience and goals. See pages three through five of “[Plain Language for Public Health.](#)”

Some audiences to consider:

Board of health	Wisconsin Statutes requires the submission of an annual report to the local board of health, so at least one of your audiences will likely be the BOH. <ul style="list-style-type: none"> <li>❖ What information does your BOH want?</li> <li>❖ What information do they need?</li> <li>❖ What format best suits their learning styles?</li> </ul>
Stakeholder/Partner groups	Do stakeholders or partners request or need particular information from your health department? Would they benefit from an annual report that highlights your interactions with them?
Health department staff	The annual report could serve as a useful historical or reference document for the health department itself. Health department staff often need and understand public health information on a more technical level. Consider whether creating a separate, more comprehensive report might be useful to the health department while avoiding unnecessary or difficult to understand information in the main report.
Public	Would the annual report serve as a resource for working with and communicating with the public? The public may need information at a higher concept level (10,000-foot view) and at a lower reading level than public health experts or stakeholders.

Audiences that do not need to be considered:

DHS	While Wis. Admin. Code requires you to submit to your annual report to DHS, DHS does not recommend that you consider DHS an audience when creating your annual report. An annual report that meets the needs of the BOH, the LHD, and/or the local community, will provide information useful to DHS.
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## Document type

Consider what format works best for your health department to tell the story of the past year. You might choose multiple formats depending on your target audience(s) and communication plan.

### Infographic

- Often intended as a “one-pager,” an effective way of communicating complicated information
- Easy to share on social media and mass distribute
- Mostly intended for public consumption

### Report

- A written, multi-page document
- More typical for a governing body than the general public

### Report and executive summary

- For lengthy reports, an executive summary that highlights the main messages may be included.
- For lengthy reports where the executive summary may be multiple pages, consider the executive summary a separate stand-alone report or combine with an infographic.

### Section of a larger health and human services report

- How can the public health and human services sections of a combined report support and reference the work and accomplishments of the other?
- Would the public health division benefit from a standalone annual report that addresses additional items or topics more in depth?

### Website

- Allows for more dynamic content
- Requires website expertise

## Content

The content of the annual report is the most important consideration after determining the audience. The content included will be directed by the audience you are trying to inform and restrained by the time available to spend on developing the report.

When adding information to your annual report, pause and ask yourself, “Why does it matter that the target audience know this about the health department?” Keep asking yourself why until you can connect the information to your community health improvement plan, your strategic plan, a relevant population-level reason, or a social determinant of health.

The following best practice characteristics were identified after review of content in a diverse sample of Wisconsin LHD annual reports and then grouped into themes. Along with including these characteristics, ensure all local accountability and disclosure requirements are met.

## Title

Title the report based on the year it covers and not when it was released. A report discussing the local health department’s work in 2021 and released in February 2022 should be titled as 2021, not 2022.

## Organization

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Organization is the structure or flow of your annual report. Use a structure that helps you highlight the strengths of your health department.

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Ways to structure the report:

- Accreditation domains ([PHAB](#))
- Foundational Public Health Services (capabilities and areas), ([PHNCI](#))
- Prevent, Promote, Protect: [National public health identity](#)
- Program area or department
- 10 Essential Public Health Services ([CDC](#))

Universal standards of practice to include (consider regardless of the structure you choose):

- Your health department logo to create a consistent, identifiable brand
  - City of Appleton includes logo on cover page and name in document footer
  - Racine County includes logo on cover page and in document footer
- The agency’s vision, mission, and value statements
- A financial chart or graph
- An organizational chart
- A letter or statement from the health officer with a brief reflection on the year, appreciation for partnerships, introduction to the document, and/or vision for the future
- A section describing the work, resolutions, or accomplishments of the board of health
- Visually distinguishing sections for easy reference, such as color-coding with corresponding symbols

## Accessibility

Meet people where they are in terms of readability to enhance comprehension. In other words, try to create content usable by everyone.

The following are guidelines for improving the accessibility of documents, however, this is not a substitute for formal training on accessibility. One place to begin is the online resource [WebAIM](#) which has an independent-study online training for creating more accessible documents.

### Language accessibility

- Consider adding more visuals (for example, icons, images, maps, photos of program activities, etc.) to decrease the amount of text in the report. See ‘Visual accessibility’ below for more information on visual content.
- Use active language.
- Use clear and easy to understand language, so the report can be understood quickly, easily, and completely by your audience. [Crawford County’s 2021 annual report](#) uses clear and relatable language.
- Write with health literacy in mind and at the level of your target audience. For example, the general public reads at a third to fifth grade level. Many reports are written at a very high level.

### Visual accessibility

- Use visuals (for example, icons, images, maps, photos of program activities, charts, etc.) to highlight key information about program activities and outcomes.
  - Consider adding a description or caption directly under the image of what is depicted.
  - When using visuals, add “alt text” to images and graphs in your report. Alt text is used to convey the “why” and what of the image as it relates to the content of a document or webpage. You can do this in multiple languages.
    - Alt text is read aloud to users by screen reader software (technology used by readers with visual impairment) and is indexed by search engines. It also displays on a webpage if the image fails to load.
    - This resource will help you learn to write good alt text: [Alt Text for Images](#) (UNC School of Medicine).
  - Ensure the pictures and graphics reflect various populations in the LHD’s jurisdiction.
- Use shapes and other distinguishing features in a chart or graph to help decipher information for people who cannot differentiate colors.
  - When you need to use color, be aware of the Web Content Accessibility Guidelines (WCAG) color contrast standards. Use a tool, like this [Color Contrast Checker website](#), to ensure your design is accessible.
  - The minimum WCAG standard is 4.5:1. At DHS, all content is required to meet the Level AAA minimum contrast ratio of 7:1 to ensure its accessibility whether increased or decreased in size. Check with a communications team or expert in your jurisdiction to learn about specific requirements.
- Use an accessibility checker (Microsoft Word has a “check accessibility” feature) to ensure the document follows accessibility best practices.



- Consider avoiding callouts.
  - Many reports use these distinct “boxes” for small blocks of featured content or information. While callouts increase visibility of specific content and make it easier for visual readers to find information, callouts are not always accessible by screen readers. Ensure any call outs are screen reader accessible or you may make your report more inaccessible to the visually impaired.

### Other accessibility considerations

- Consider whether videos can be made available and created in multiple languages.
- Ensure any videos have captions.
- Offer the report in other formats. For example, the City of Milwaukee Health Department annual report is available in braille and large print.
- Select a font that is simple, familiar, and aligns with the tone, messaging, and brand of the content. The following resources can assist your department in deciding on the best font and colors to use for your report.
  - [How to Pick a Font](#) (WebAIM)
  - [Best Fonts for Web Accessibility](#) (Bureau of Internet Accessibility)
  - [How to Design for Color Blindness](#) (Get Feedback.com)
  - [Accessibility Basics: Designing for Visual Impairment](#) (envato tuts+)

### Credibility (trust and transparency)

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Data are a cornerstone of public health. Use data and supporting information to demonstrate the department’s reliability as a key source of information and expertise related to population-level health outcomes.

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- Track data over time using charts, graphs, or other appropriate graphics. The use of trend data builds context. For clear presentation, consider:
  - Showing data clearly and consistently (for example, when using a variety of tables showing data over multiple years check that they all ascend or descend when reading from left to right).
  - Including clear legends.
  - Providing brief narratives to highlight what the data are telling you.
- Include links to reports referenced in your annual report for easy access to more detailed information.
- Provide diverse types of data.
  - Include both quantitative and qualitative data: Multiple data types enhance the understanding of health department activities and outcomes.
  - Aim for data that include counted things (for example, number of shots, number of investigations, number of people served, number of radon kits distributed) or the impact generated (for example, whether people being served are better off, how many people took action based on an education campaign).
- Present information in a fair and balanced manner and honestly reflect on accomplishments and challenges.
  - City of Milwaukee Health Department annual reports include a section under each program area for reflection on program performance ([2020](#) and [2021](#)).

## Impact

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Expand the understanding of public health (and health) for your audience. Include the impact your health department has made on your jurisdiction.

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- Describe what public health is, what it does, and why it matters. Winnebago County uses a video on the annual report webpages ([2020](#)).
- Describe policy impacts made by the governing body and/or highlight health policy changes throughout the report.
- Include clear links of accomplishments or activities to the department's strategic plan, community health assessment, community health improvement plan, essential public health services, and/or foundational public health services.
- Report impact over counts
  - Reporting counts gives numerical values to work and is useful is reporting how *much* work your health department completed. Examples: Your health department...
    - Employs X staff.
    - Administered Y vaccinations.
    - Distributed Z well water test kits last year.
  - Demonstrating the improved outcomes or community impact is *more* useful.
    - Did those staff fill an access gap in your community?
    - What would your community's health look like without those vaccinations?
    - How many people returned their test kits and then took action?
  - Providing numbers means very little without context. Tell the health department's story.
    - Good example: X groups formed to address community needs and met # times.
    - Even better example: X groups took actions A, B, and C to improve the community in ways D, E, and F. This matters because G, H, and I.
- Include information about why each program is important to the community as a whole (that is, economy, environment, safety, connectedness, etc.).
- Include population-level impact along with individual measures. Sharing information about how the population and/or community is better off can be accomplished by looking at data you have decided to include in your report and asking yourself "Why?" until you can complete the sentence "...and this matters because..."

Wood County in their 2021 report when describing a pharmaceutical collection program, highlighted that doing so protected groundwater and surface water, wildlife, and public health.

- Highlight the impact of your accomplishments on the population and the places people live, work, play, and pray.
- Share testimony from community members. Adding the "voice of the community" helps tell the story of your impact. Qualitative data enhances the understanding of the quantitative data reported on in the report.
  - Use a quotation from a community member.
  - Share a community member's story.

## Communications

A completed annual report needs to be distributed to the target audience. No one can find out about your health department's challenges and accomplishments or give you feedback on the report if they do not know it exists.

If your health department has a communication procedure(s) in place, follow those for crafting and executing a communication plan prior to release of a final draft. If not, consider creating a communication plan to identify audiences, tactics (electronic, print, social media, etc.), and distribution steps. The communication plan will vary based on the audience. A report intended as a reference document shared publicly to promote government transparency will likely have a more passive communication plan than a report created to drive community action on the community health improvement plan. The CDC's [Health Communication Playbook](#) provides helpful information and tools that can be adapted to communicating about the LHD's annual report.

Confirm your plan meets local requirements and needs about who must receive the document and how it is shared with them.

## Considerations

- Post annual reports on your website.
- Develop infographics with key highlights and post to social media.
- Engage a community member's voice to entice people to read the full report.
- Implement a process to receive feedback from your target audience.
- Collaborate with other sectors and partners to distribute.

## Annual report examples

Below, are annual reports OPPA has reviewed that have served their health department and their jurisdiction well. DHS has included these reports in communications to health departments as examples to draw on. Note that some reports are not called “reports,” instead using alternate terms like “Snapshot”.

- Appleton Health Department, City of  
[2021 Annual Report](#) includes logo on cover page and name in document footer.
- Crawford County  
[2021 Annual Report](#) uses clear and relatable language.
- Cudahy Health Department, City of
  - [2020 Annual Report](#): The Cudahy Health Department organizes its annual report around the Foundation Public Health Services model, the same model used as the organizing basis for the DHS 140 rule language.
  - Summary [infographic](#) for the 2019 report.
- Juneau County  
[2019 Annual Snapshot](#): Almost every page of Juneau County’s report could be used as a separate infographic, making it a quick read.
- Manitowoc County  
Manitowoc County’s [2020 Annual Report](#) shows data trends with simple graphs and limited formatting.
- Milwaukee, City of  
City of Milwaukee Health Department annual reports ([2020](#) and [2021](#)) includes a section under each program area for reflection on program performance.
- Pierce County  
Pierce County organized their [2020 Annual Report](#) around an informative and concise description of what the pandemic response meant for the department’s work.
- Racine County Public Health Division  
[2021 Annual Report](#) includes logo on cover page and in document footer.
- Winnebago County  
Winnebago’s [2019 Annual Report](#) exists entirely online as a webpage and includes a video on the webpage.
- Wood County  
[2021 Annual Report](#) includes population level impact along with individual measures (when describing a pharmaceutical collection program).

## Connections to national models

As you implement or align with the foundational public health services capabilities, the national public health performance standards, and/or seek Public Health Accreditation Board (PHAB) accreditation, the annual report can be used to demonstrate how you communicate with the community and governing body.

Ideas to keep in mind if you are implementing or aligning with national models:

Communicate the following:

- What public health is
- What public health does
- Why it matters
- What the health department brand is, using a common identity (logo)

Create a communications plan that:

- Includes a mechanism for the community to provide feedback.
- Uses a variety of communication channels and partners for distribution (including communities that are not traditionally reached through typical public health channels).
- Intentionally reviews documents for accessibility:
  - Literacy level
  - Visual impairment
  - Language

Use a health equity lens.

- Describe the variety of populations in the LHD's jurisdiction.
- Discuss the challenges the jurisdiction's populations face. Work with community members to identify indicators of interest and progress towards goals.
- Use disaggregated data to highlight the issues faced by and efforts to reduce inequities experienced by diverse populations.
- Discuss how LHD work, programs, or initiatives do or do not address the challenges faced by diverse populations. Use qualitative data and community-based participatory research to enhance quantitative data.
- Partner with other government agencies to identify, analyze, and report data about the social determinants of health.
- Determine standard definitions to use for equity terms to establish a common understanding.

Connect performance and outcomes.

- Show linkages between strategic plan, health improvement plan, and performance management.
- Demonstrate contributions of partners to public health and/or public health's contribution to partner policies (health in all policies).
- Articulate the purpose of public health laws to foster awareness of their role in promoting and protecting public health.
- Share public health innovations.

Change the conversation about health.

- Work with communities experiencing inequities and others to develop, use, and promote a shared narrative around health that focuses on the social determinants of health, power, and oppression rather than individual responsibility and a biomedical model.
- Talk about the role of policy, systems, and environmental change in addressing inequities.
- Leverage data to:
  - Change the narrative of what creates health.
  - Inform and inspire policy change.
  - Support partnerships and engagement.
- When developing agency publications, frame messaging in a way that:
  - Connects individual health outcomes to the social issues and inequities that drive those outcomes.
  - Presents a solution to the problem.
  - Assigns primary responsibility for who can fix the problem.
  - Makes a practical policy appeal.
  - Uses stories and images to humanize the impacts.
  - Adapts communications to various audiences, including communities experiencing inequities and decision makers.

## Resources

### Legal

- [Wisconsin Stat. § 251.06\(3\)\(h\)](#) — Report Submission Requirement: Board of Health
- [Wis. Admin. Code § DHS 140.04\(2\)\(a\)](#) — Report Submission Requirement: DHS

### Audience

[Plain Language for Public Health](#) (Public Health Communications Collaborative)  
Primer on how to define your audience and goals (pages 3-5).

### Content

- Report organization
  - [Accreditation domains](#) (PHAB)
  - [Foundational Public Health Services](#) (capabilities and areas), (PHNCI)
  - [Prevent, Promote, Protect](#): National public health identity
  - [10 Essential Public Health Services](#) (CDC)
- Training
  - [Independent-study online accessible documents training](#) (WebAIM)
- Fonts
  - [How to pick a font](#) (WebAIM)
  - [Best fonts for web accessibility](#) (Bureau of Internet Accessibility)
- Visual impairment
  - [Alt Text for Images](#) (UNC School of Medicine)
  - [Color contrast checker website](#) (Web Content Accessibility Guidelines)
  - [How to Design for Color Blindness](#) (Get Feedback.com)
  - [Accessibility Basics: Designing for Visual Impairment](#) (envato tuts+)

### Communications

[Health Communication Playbook](#) (CDC)  
Helpful information and tools.

### Other resources

- [How to Tell a Great Story in Your Annual Report](#) (Column Five Media)  
Blog post that summaries at a high level annual report creation.
- [FrameWorks Institute](#)  
Think tank with resources on framing and narrative.
- [Government financial reporting review: Best practice examples from 2020-2021 \(HM Treasury, UK\)](#)  
Provides overview of best practices in government financial reporting in the UK.
- [HealthEquityGuide.org](#)  
Strategic practices to assist health departments in advancing health equity more meaningfully and comprehensively.
- [Health Equity Guiding Principles for Inclusive Communication](#) (CDC)  
Guidelines for assisting public health professionals in creating inclusive communications.
- [Public Health Communications Collaborative](#)  
A collaborative of partners with a collection of tools to support public health communicators in creating timely, clear, credible, and effective messages.