



The Persimmony System

F5SMC Commission Meeting
August 27, 2018



Persimmony

An online grants management and data collection system that is used by 20 First 5 County Commissions.

- Annual budget: \$96,896
- System modules include: Fiscal, Performance, Client Data, Reports, Procurement, etc.
- F5SMC implemented Persimmony for grants management and reporting during the FY 16-17 Mid-Year reporting cycle



For more information, visit:
<https://persimmony.com>

Successes & Challenges



Successes

- Budget tracking and invoicing
- Improved grantee compliance with reporting
- Ease of access to grants management information for F5 staff
- Customized reports
- Electronic signature
- Elimination of redundant paper-based processes and reduced “version control” issues

Challenges

- Transition from paper-based to electronic system required updating our procedures and documentation
- Citrix
- Compatibility with Mac computers
- Need for training and TA due to staff turnover and infrequent use of the system
- Individual-level client data entry

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Ongoing Custom Development

- Ability to automatically calculate allowable indirect costs
- Ability to allow for within-category line-item overspend, up to an F5SMC-approved limit
- Adding additional notes fields to allow for efficient and well-documented monitoring and review
- Enabling subcontractor budgets to automatically roll up into lead agency budgets, streamlining budgeting and invoicing for F5 and Lead Agencies



[A look at the system...](#)

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Questions and/or
Comments?



FIRST 5 SAN MATEO COUNTY'S
ACCOMPLISHMENTS-
FISCAL YEAR 2017 -2018



**INCREASE IN F5SMC
COMMUNICATIONS:**

- New Website
- New Social Media Presence on multiple platforms
- Impact Stories produced for F5 Advocacy Day in Sacramento on May 2, 2018



**SECURED \$687,000
ADDITIONAL
REVENUE FOR
VARIOUS
PROGRAMS AND
INITIATIVES**

**REPORTED IN
F5SMC LONG TERM
FINANCIAL PLAN IN
JUNE, 2018**



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**Persimmony Grants
Management
Software
Implementation to
streamline processes
& procedures**



**Engaged two new
Commissioners:**

**Rosanne Foust,
CEO/President
SAMCEDA
and
Nicole Pollack, HSA
Director**

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- Increased community awareness and child care spaces for young children through Build-Up for SMC Children Initiative
- Ensured Family Engagement services/programs of SMC Big Lift Initiative continued due to the loss of Federal Social Innovation Fund dollars
- Completed all contracts for Community Investments for 2018 - 2020

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Expanded systems work with SMC Human Services Agency:



- Trauma Informed Initiative
- Child Support Department Trainings
- Participation on Community Collaborative for Children's Success (CCCS)

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INCREASED ADVOCACY

- submission of advocacy/support letters on state legislation;
- providing input to State Assembly Blue ribbon Commission on Early Childhood Education;
- representation/leadership on F5 State Association Policy Committee



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EXPANSION OF COMMISSIONER AND STAFF ROLES AS LEADERS/CONVENERS:

- Trauma Informed Initiative
- Build-Up for SMC Children's Initiative
- Chairing SMC Oral Health Coalition



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First 5 San Mateo County Strategic Plan 2015-2020 Revision



Michelle Blakely, First 5 San Mateo County
Christina Bath Collosi, VIVA Strategy + Communications

August 27, 2018



F5SMC Strategic Plan Revision

Revision Process – remains the same:

- *Vision*
- *Mission*
- *Desired outcomes*
- *Commission Roles in the Community*
- *Focus Area Framework*

Revision Process – primary changes:

- *Strategies within Focus Areas*
- *Indicators to Measure Progress*



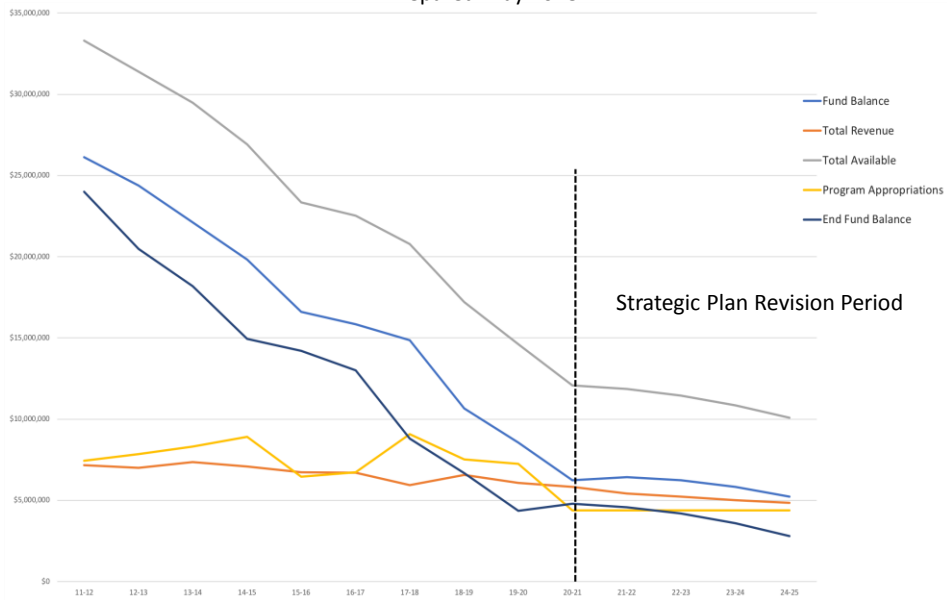
Persistent Challenge

How can First 5 San Mateo County maximize impact in the community at a time of declining financial resources?



Financials Over Time

Prepared May 2018



Commission: Plan Revision Touchpoints

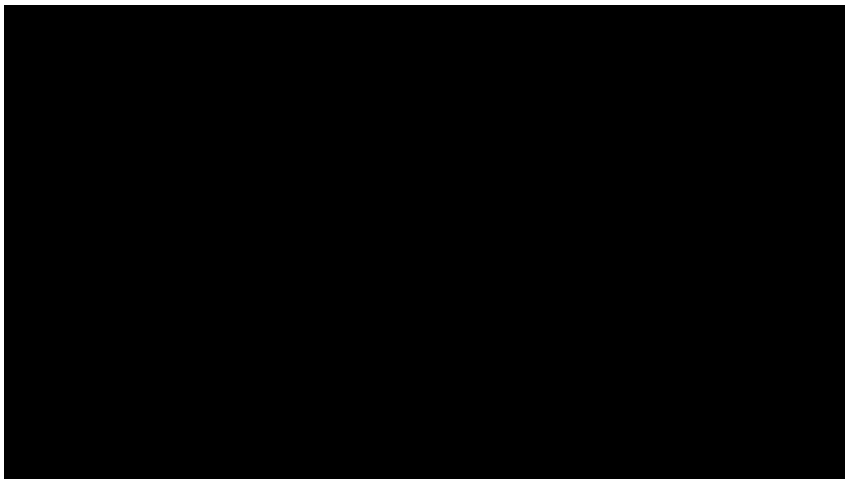
July 30, 2018: Vision, Mission, Desired Outcomes, Commission Roles, Plan Focus Area Framework, Financials Over Time, Ad-hoc Committee, Public Forum, Partnership Breakfast

August 27, 2018: Strategies for Investment

October 22, 2018: 2020-2025 Strategic Plan Adoption



Our kids!



Proposed Strategies

Early Learning

- Quality Improvement
- Expand Access to Early Learning Settings for Children with Special Needs and for Infants and Toddlers

Child Health and Development

- Oral Health Access and Utilization
- Early Mental Health Systems and Infrastructure Enhancements
- Integrated Systems for Children with Special Needs and their Families

Family Engagement

- Intensive Support for Families with Multiple Risk Factors
- Parent Connectivity
- Family Engagement Capacity Building

Partnership, Advocacy, Communications

- Leadership on Early Childhood Advocacy & Policy Development
- Community Partnership
- Community Education



Thank you!

