

## FIRST 5 SAN MATEO COMMISSION MEETING

### HOW TO PARTICIPATE

- Commission and others, we recommend to be on the call Monday at 3:40 PM so we can test prior to the 4 PM meeting start time and ensure that you have connection.
- Please note that public is attending this meeting and they may join early so please keep that in mind
- Be sure to mute your microphone during the meeting until called upon to speak
- If you plan to join by phone, please let Myra Cruz or other First 5 Staff know the phone number in advance so we can identify you to the Commission, and we will rename your masked phone number to show your name instead. We highly encourage that you join early so we can make this change, OR you can email us your phone # ahead of time to [ecruz@smcgov.org](mailto:ecruz@smcgov.org) .
- **JOINING VIA ONLINE:**  
For those attending the meeting on the Zoom videoconference, (click the link listed on the agenda), we will use the “raise hand” feature in order to organize any public comments. During the general public comment period, and for each item on the Regular Agenda, F5SMC Staff, will ask those members of the public who wish to comment to click the “raise hand” feature to raise your hand to speak on that agenda item.
- **JOINING BY PHONE:**  
The phone number is listed on the agenda.  
Press \*6 to mute and unmute your phone  
Press \*9 if would like to speak. This would notify the staff that you would like to speak.

Please note that members of the public must wait for the prompt in connection with each Agenda item before using the raise hand function. For example, you cannot raise your hand at the beginning of the meeting for an Agenda item that is later in the meeting.

When you hear your name called, F5SMC Staff, will unmute your mic to begin speaking. You may only speak once per agenda item.

**\* PUBLIC HEARING MEETING NOTICE\***  
**FIRST 5 SAN MATEO COUNTY (F5SMC)**  
**COMMISSION MEETING**

On September 16, 2021, the Governor signed AB 361, which amended certain provisions of the Ralph M. Brown Act (Government Code section 54950, *et seq.*) to allow for local agency legislative bodies to conduct their meetings remotely either telephonically or by other electronic means under specified circumstances. Thus, pursuant to Government Code section 54953(e), the First 5 San Mateo County Commission meeting will be conducted via remote conferencing.

**DATE: Monday, February 28, 2022**

**TIME: 4:00 PM – 6:00 PM**

**Join Zoom Meeting**

**Online: <https://smcgov.zoom.us/j/97618515225>**

**Phone: US: +1 669 900 6833**

**Webinar ID: 976 1851 5225**

<b>AGENDA</b>		
<b>Call to Order and Preliminary Business</b>		
<b>1</b>	<b>Roll Call</b>	<b>4:00 PM</b>
<b>2</b>	<b>Adopt a resolution finding that, as a result of continuing COVID-19 pandemic state of emergency, meeting in person for the First 5 San Mateo County Commission would present imminent risks to the health or safety of attendees (See Attachment 2A. and Attachment 2B.)</b>	
<b>3</b>	<b>Public Comment</b>	
<b>4</b>	<b>Action to Set Agenda for February 28, 2022 Meeting and Approve Consent Agenda Items</b> <i>(This item is to set the final consent and regular agenda, and for the approval of the items listed on the consent agenda. All items on the consent agenda are approved by one action.)</i>	
<b>5</b>	<b>Commission Announcements</b>	<b>4:05 PM</b>
<b>6</b>	<b>Storytelling: First 5 Work/Impact: Tu y Yo Developmental Playgroup</b> by Alejandra Garcia, Help Me Grow Coordinator and Martha Carcamo, Help Me Grow Supervisor	<b>4:10 PM</b>
<b>Action Item</b>		
<b>7</b>	<b>Approval of First 5 San Mateo County’s FY 2021 – 22 Revised Budget and the Use of Ending Fund Balance (Ending Reserves*) to Fund FY 2021 – 22 Revised Budget</b> <i>(See Attachment 7)</i>	<b>4:15 PM</b>
<b>Discussion Item</b>		

<b>8</b>	<b>Presentation: Family Story Project: Conversations with Families with Young Children</b> by Michelle Blakely, Deputy Director, First 5 San Mateo County (See Attachment 8)	4:25 PM
<b>Informational Item</b>		
<b>9</b>	<b>Report of the Executive Director</b> (See Attachment 9)	4:45 PM
<b>Discussion Item</b>		
<b>10</b>	<b>Presentation: Integrated System for Children with Special Needs Initiative Update</b> by Emily Roberts, Strategic Initiatives Project Manager, First 5 San Mateo County, and Carol Elliott, Director of Family Support Services, AbilityPath (See Attachment 10)	5:05 PM
<b>Informational Item</b>		
<b>11</b>	<b>Committee Updates</b> (See Attachment 11)	5:25 PM
<b>12</b>	<b>Adjournment</b>	6:00 PM

**\* Public Comment:** This item is reserved for persons wishing to address the Commission on any Commission-related matters that are as follows: 1) Not otherwise on this meeting agenda; 2) Listed on the Consent Agenda; 3) Executive Director’s Report on the Regular Agenda; or 4) Subcommittee Members’ Reports on the Regular Agenda. Public comments on matters not listed above shall be heard at the time the matter is called.

Persons wishing to address a particular agenda item should speak during that agenda item. Speakers are customarily limited to two minutes, but an extension may be provided to you at the discretion of the Commission Chair.

The identified times are approximate and are intended to serve as a guide to the public and all First 5 meeting attendees regarding the approximate start times for any one section of the Agenda. The actual start and end times for an agenda item may differ from the noted times.

Public records that relate to any item on the open session agenda for a regular Commission meeting are available for public inspection. Those records that are distributed less than 72 hours prior to the meeting are available for public inspection at the same time they are distributed to all members, or a majority of the members of the Commission. The documents are also available on the First 5 Internet Web site at [www.first5.smcgov.org](http://www.first5.smcgov.org).

Individuals who require special assistance or a disability-related modification or accommodation to participate in this meeting, or who have a disability and wish to request an alternative format for the agenda, meeting notice, agenda packet or other writings that may be distributed at the meeting, should contact Myra Cruz, by 12 Noon on Friday, February 25, 2022 at 650.372.9500 x232 and/or [ecruz@smcgov.org](mailto:ecruz@smcgov.org). Notification in advance of the meeting will enable the Commission to make reasonable arrangements to ensure accessibility to this meeting, the materials related to it, and your ability to comment.

**Date:** February 28, 2022  
**To:** First 5 San Mateo County Commission  
**From:** Kitty Lopez, Executive Director  
**Subject:** **Resolution to make findings allowing continued remote meetings under Brown Act**

**RECOMMENDATION:**

Adopt a resolution finding that, as a result of the continuing COVID-19 pandemic state of emergency declared by Governor Newsom, meeting in person for the First 5 San Mateo County Commission would present imminent risks to the health or safety of attendees.

**BACKGROUND:**

On June 11, 2021, Governor Newsom issued Executive Order N-08-21, which rescinded his prior Executive Order N-29-20 and set a date of October 1, 2021 for public agencies to transition back to public meetings held in full compliance with the Brown Act. The original Executive Order provided that all provisions of the Brown Act that required the physical presence of members or other personnel as a condition of participation or as a quorum for a public meeting were waived for public health reasons. If these waivers had fully sunset on October 1, 2021, legislative bodies subject to the Brown Act would have to contend with a sudden return to full compliance with in-person meeting requirements as they existed prior to March 2020, including the requirement for full physical public access to all teleconference locations from which board members were participating.

On September 16, 2021, the Governor signed AB 361, a bill that formalizes and modifies the teleconference procedures implemented by California public agencies in response to the Governor's Executive Orders addressing Brown Act compliance during shelter-in-place periods. AB 361 allows a local agency legislative body to continue to use teleconferencing under the same basic rules as provided in the Executive Orders when certain circumstances occur or when certain findings have been made and adopted by the legislative body.

AB 361 provides that Brown Act legislative bodies must return to in-person meetings on October 1, 2021, unless they choose to continue with fully teleconferenced meetings because a specific declaration of a state or local health emergency is appropriately made. AB 361 allows legislative bodies to continue to conduct virtual meetings as long as there is a gubernatorially-proclaimed public emergency in combination with (1) local health official recommendations for social distancing or (2) adopted findings that

meeting in person would present an imminent risk to health or safety of attendees. AB 361 became effective on October 1, 2021 and will sunset on January 1, 2024.

AB 361 also requires that, if the state of emergency remains active for more than 30 days, the legislative body must make findings by majority vote every 30 days to continue using the bill's exemption to the Brown Act teleconferencing rules. The findings demonstrate the need for teleconferencing persists due to the nature of the ongoing public health emergency. Effectively, this means that legislative bodies must either agendaize a Brown Act meeting once every thirty days to make these findings, or, if a legislative body has not made such findings within the prior 30 days, the legislative body must re-adopt the initial findings if it wishes to conduct a remote meeting.

The County Board of Supervisors has adopted a resolution finding that, as a result of the continuing COVID-19 pandemic state of emergency, meeting in person "would present imminent risks to the health or safety of attendees."

The County's resolution states, among other things, that: "The Board of Supervisors strongly encourages all legislative bodies of the County of San Mateo that are subject to the Brown Act, including but not limited to, the Planning Commission, the Assessment Appeals Board, the Civil Service Commission, and all other oversight and advisory boards, committees and commissions established by the Board of Supervisors and subject to the Brown Act, to make a similar finding and avail themselves of teleconferencing until the risk of community transmission has further declined, and directs the County Manager to provide necessary support for these legislative bodies to continue teleconferencing procedures when they have adopted such findings."

**DISCUSSION:**

Because local rates of transmission of COVID-19 are still in the "high" tier as measured by the Centers for Disease Control, we recommend that the First 5 San Mateo County Commission avail itself of the provisions of AB 361 allowing continuation of online meetings by adopting findings to the effect that conducting in-person meetings would present an imminent risk to the health and safety of attendees. A resolution to that effect and directing staff to take such other necessary or appropriate actions to implement the intent and purposes of the resolution, is attached hereto.

**FISCAL IMPACT:**

None

**RESOLUTION NO.**

**RESOLUTION FINDING THAT, AS A RESULT OF THE CONTINUING COVID-19 PANDEMIC STATE OF EMERGENCY DECLARED BY GOVERNOR NEWSOM, MEETING IN PERSON FOR THE FIRST 5 SAN MATEO COUNTY COMMISSION WOULD PRESENT IMMINENT RISKS TO THE HEALTH OR SAFETY OF ATTENDEES**

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**WHEREAS**, on March 4, 2020, pursuant to Government Code section 8550, *et seq.*, Governor Newsom proclaimed a state of emergency related to the COVID-19 novel coronavirus, and subsequently, the San Mateo County Board of Supervisors (“Board”) declared a local emergency related to COVID-19, and the proclamation by the Governor and declaration by the Board remain in effect; and

**WHEREAS**, on March 17, 2020, Governor Newsom issued Executive Order N-29-20, which suspended certain provisions in the California Open Meeting law, Government Code section 54950, *et seq.* (the “Brown Act”), related to teleconferencing by local agency legislative bodies, provided certain requirements were met and followed; and

**WHEREAS**, on June 11, 2021, the Governor issued Executive Order N-08-21, which extended provisions of Executive Order N-29-20 that waive otherwise-applicable Brown Act requirements related to remote/teleconference meetings by local agency legislative bodies through September 30, 2021; and

**WHEREAS**, on September 16, 2021, Governor Newsom signed AB 361 into law, and AB 361 provides that a local agency legislative body subject to the Brown Act may continue to meet without complying with the otherwise-applicable requirements in the Brown Act related to remote/teleconference meetings by local agency legislative

bodies, provided that a state of emergency has been declared and the legislative body determines that meeting in person would present imminent risks to the health or safety of attendees, and provided that the legislative body makes such finding at least every thirty (30) days during the term of the declared state of emergency; and

**WHEREAS**, on September 28, 2021, in the interest of public health and safety, as affected by the state of emergency caused by the spread of COVID-19, the Board issued a finding that meeting in person would present imminent risks to the health or safety of attendees, and decided to invoke the provisions of AB 361 related to teleconferencing for meetings of the Board; and

**WHEREAS**, the Board also strongly encouraged other County legislative bodies to make a similar finding and continue meeting remotely through teleconferencing; and

**WHEREAS**, the Centers for Disease Control (“CDC”) has established a “Community Transmission” metric with 4 tiers designed to reflect a community’s COVID-19 case rate and percent positivity; and

**WHEREAS**, local rates of transmission of COVID-19 are still in the “high” tier as measured by the CDC; and

**WHEREAS**, the First 5 San Mateo County Commission has an important governmental interest in protecting the health, safety and welfare of those who participate in its meetings; and

**WHEREAS**, in the interest of public health and safety, as affected by the emergency caused by the spread of COVID-19, the First 5 San Mateo County Commission finds that meeting in person would present imminent risks to the health or

safety of attendees, and the First 5 San Mateo County Commission will therefore invoke the provisions of AB 361 related to teleconferencing for meetings of the San Mateo County Commission.

**NOW, THEREFORE, IT IS HEREBY DETERMINED AND ORDERED** that

1. The recitals set forth above are true and correct.
2. The First 5 San Mateo County Commission finds that meeting in person would present imminent risks to the health or safety of attendees.
3. Staff is directed to take such other necessary or appropriate actions to implement the intent and purposes of this resolution.

\* \* \* \* \*



First 5 San Mateo County Commission Meeting

**CONSENT AGENDA**

February 28, 2022

All items on the consent agenda are approved by one roll call motion unless a request is made at the beginning of the meeting that an item be withdrawn or transferred to the regular agenda. Any item on the regular agenda may be transferred to the consent agenda.

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- 4.1 Approval of the January 24, 2022 Commission Meeting Minutes  
(See Attachment 4.1)

**First 5 San Mateo County (F5SMC)  
COMMISSION MEETING MINUTES  
January 24, 2022  
Via Zoom**

**Call to Order & Roll Call**

**1. Roll Call**

Commission Members: Alexis Becerra, Ken Cole, Sylvia Espinoza, Rosanne Foust, Carole Groom, Nancy Magee\*, Naveen Mahmood, Nkia Richardson, Louise Rogers,

Valeria Chavez-Franco (Youth Commission)

Staff: Kitty Lopez, Michelle Blakely, Emily Roberts, Khanh Chau, Karen Pisani, Mey Winata, Myra Cruz

County Counsel: Monali Sheth

*\*Not present during roll call.*

A quorum was present. Commissioner Foust called the meeting to order at 4:02 PM; roll call was taken.

**2. Adopt a resolution finding that, as a result of continuing COVID-19 pandemic state of emergency, meeting in person for the First 5 San Mateo County Commission would present imminent risks to the health or safety of attendees**

Commissioner Foust presented and requested to adopt the resolution referring to Attachment 2a & 2b.

MOTION: GROOM/ SECOND: BECERRA

AYES: BECERRA, COLE, ESPINOZA, FOUST, GROOM, MAHMOOD, RICHARDSON, ROGERS  
CHAVEZ-FRANCO (YOUTH COMMISSION)

NOES: NONE

ABSTAIN: NONE

Motion approved

Public Comments: None

**3. Public Comments: None**

**4. Action to Set Agenda for January 24, 2022 Meeting and Approve Consent Agenda Items**

MOTION: GROOM/ SECOND: ROGERS

AYES: BECERRA, COLE, ESPINOZA, FOUST, GROOM, MAHMOOD, RICHARDSON, ROGERS  
CHAVEZ-FRANCO (YOUTH COMMISSION)

NOES: NONE

ABSTAIN: NONE

Motion approved.

**5. Commission Announcements:**

- Commissioner Rogers announced that San Mateo County's Health will be hosting a livestream event geared towards Spanish-speaking community related to COVID-19 stories. (San Mateo County's Behavioral Health and Recovery Services is hosting Spanish-speaking Livestream event on Families with OMICRON: Stories and Resources, February 7<sup>th</sup> at 6:30 pm)

- Commissioner Foust welcomed Youth Commissioner Chavez-Franco and new Commissioners, Espinoza, Mahmood, and Richardson. She congratulated Commissioner Becerra for her new position as F5SMC's Vice-Chair, and thanked Commissioner Rogers for chairing the Commission for two years.

**6. Storytelling: First 5 Work/Impact**

*Why You Should Screen for ACEs – ACEs Aware San Mateo* video was played. Emily Roberts, F5SMC's Strategic Initiatives Manager, shared that the video features some local pediatric providers sharing their experiences of screening their patients for ACEs (Adverse Childhood Experiences) initiative. This partnership was featured at the statewide convening around grantees as an example of a successful local partnership. F5SMC is one of the grant recipients to participate in the state's ACEs Aware initiative and is working with the Health Plan of San Mateo to promote this initiative.

The video can be accessed on <https://first5sanmateo.org/adverse-childhood-experiences/>

Commission made comments.

Public Comment: None

**7. New Commissioner Introductions: Sylvia Espinoza, Naveen Mahmood, and Nkia Richardson**

Commissioners Espinoza, Mahmood and Richardson provided brief background about themselves.

- Commissioner Mahmood shared that she has been a pediatrician for about 20 years and currently is a pediatrician at Palo Alto Medical Foundation. She grew up in Pakistan and came to United States when she was a teenager. She has two daughters and knows how hard to navigate the systems. She also goes back to Pakistan and works with underprivileged children and families. She's excited about First 5 Initiatives such as the ACEs Initiative.
- Commissioner Espinoza shared that she's honored to be part of the Commission. She worked with the County many years ago for 16 years, and currently a pediatrician for 24 years. She has a lot experience working with minorities, and it's a calling for her to give back to the community. She's honored to be part of Commission.
- Commissioner Richardson shared that she's currently the Executive Director of CASA. She recognized that the first 5 years are critical times for children. She's excited to work with Commission and recognizing the inequities exist within the community. She's looking forward on having conversations on how we can make a positive impact to the families who are struggling to navigate the system and experiencing inequities. She's honored to be chosen to be part of this group.
- Youth Commissioner Valeria Chavez-Franco shared that she is a sophomore at Woodside Priory School. She joined First 5 three months ago. Excited to be part of the Commission and the work they do for future generations. Kitty Lopez added the Valeria had written a blog for the First 5 about her background. Her blog can be found on <https://first5sanmateo.org/introducing-first-5-smcs-newest-youth-commissioner-valeria-chavez/>

Commission made comments and asked questions.

Public Comment: None

**8. Presentation: Trauma and Resiliency Informed Systems Initiative (TRISI) Update**

Emily Roberts, F5SMC's Strategic Initiatives Project Manager and Tamara Hamai, President, Hamai Consulting, presented the TRISI Update and highlighted the following:

- The long-term goal of TRISI is to embed trauma-informed policies and practices at every level of the system.
- Funding partners along with F5SMC include Behavioral Health and Recovery Services, Mental Health Services Act, Prevention and Early Intervention, and Sequoia Healthcare District.
- F5SMC TRISI: Theory of Change current activities are Trauma Informed Organization (TIO) Assessment Support and TIO Implementation Support.
- Core Team Roles.
- Overall process, timing, cohorts, and coaching structure.
- Reflections on ways we grew such as more open communication, paying more attention to others, and started setting more boundaries and practicing more self-care.
- Reflections on ways we can grow such as more intentionally integrate this work with our equity work, continue this work as policy and culture change take time, and deepen connection between the cohorts and coaching.
- Next steps for TRISI 1.0 includes monthly cohorts ended January 2022, move to quarterly cohort meetings for remainder of 2022; monthly individual agency-level coaching available for six current agencies through June 2022; and possible opportunities to share across cohorts during the year.
- Next steps for TRISI 2.0 includes focus on 3 – 4 large public child and family serving agencies; similar duration and structure to TRISI 1.0; and incorporating feedback/learnings from 1.0 into sequencing and structure.

Commission made comments.

Public Comment: None

The Power Point Presentation can be found on the F5SMC's website, [January 24, 2022 Commission Meeting Presentations](#).

#### 9. **Presentation: First 5 San Mateo County Home Visiting Systems Environmental Scan in San Mateo County**

Michelle Blakely, F5SMC's Deputy Director, shared that F5SMC and local home visiting partners are participating in First 5 California statewide Home Visiting Initiative, and a brief background is in the packet. Blakely introduced the presenter. Tamara Hamai presented the Home Visiting Scan in San Mateo County and highlighted the following:

- Home visiting is part of system or network of services, and its purpose is to help counties create a sustainable, unified system that supports families with the home visiting services they need and maximize available funding to serve more families.
- Action plan goals.
- Appreciative inquiry consists of 4 phases which includes strategies and action plans, data collection, priorities and visioning.
- San Mateo County mapping family needs and assets based on Strong Start Index, Healthy Places Index, Social Vulnerability Index, COVID-19 Vulnerability and Recovery Index, and Average Quintile for All Need Indexes.
- Ten home visiting programs agencies in SMC which includes, IZZI, StarVista, Puente de la Costa Sur, Peninsula Family Services, Family Connections, and SMC Children and Family Services
- Data such as 792 children served in home visiting.
- Literature review findings shows that collaboration is essential to coordinating home visiting services.

- Aspects of collaboration such as community involvement, common goals or tasks and shared responsibilities for coordination of the home visiting system.
- Collaboration strategies includes referral networks with warm handoffs, liaisons, advisory committees, centralized intake system, and linking funding to integration.
- Feedback from parent focus group and provider focus group.
- Timeline.
- Deeper analysis and review of the draft GIS mapping will be conducted as there were clarifications needed.

Commission made comments.

Public Comment: None

The Power Point Presentation can be found on the F5SMC's website, [January 24, 2022 Commission Meeting Presentations](#).

**10. Appointment of New Commissioners (Naveen Mahmood, Sylvia Espinoza and Nkia Richardson) to Program, Operations and Planning Committee, Finance and Administration Committee, and Early Childhood Evaluation Advisory Committee**

MOTION: COLE/ SECOND: MAGEE

AYES: BECERRA, COLE, ESPINOZA, FOUST, GROOM, MAGEE, MAHMOOD, RICHARDSON, ROGERS  
CHAVEZ-FRANCO (YOUTH COMMISSION)

NOES: NONE

ABSTAIN: NONE

Motion approved.

Public Comment: None

**11. Report of the Executive Director**

The Executive Director's written report was included in the [January 24, 2022 Commission Meeting Packet](#). Kitty Lopez, highlighted the following:

- Thanked Commissioner Rogers for chairing the F5SMC Commission for 2 years.
- Silicon Valley Community Foundation, F5SMC, Child Care Partnership Council, and San Mateo County Office of Education released an RFQ in search for a firm or consultant to conduct the needs assessment. Among the purposes of the needs assessment is to identify supply gaps in child care and early learning.
- Peninsula Health Care District awarded \$50,000 grant for another year to Help Me Grow Initiative.
- Friday CAFÉ will be held on January 28, 2022. See link in the ED Report to register.
- Children Now recently released the *2022 California Children's Report Card Report*.
- First 5 California, First 5 Association, and First 5 LA press released on California's FY 22-23 State Budget.
- San Mateo County Pandemic Recovery Initiative Update
- F5SMC's released its quarterly electronic newsletter on January 11, 2022

Commissioner Foust added that the 58 county commissions elected Kitty Lopez as new First 5 Association New Chair. Commissioner Foust also thanked the First 5 Team, Monali Sheth, Commissioner Rogers, and Commissioner Magee for all they do.

Public Comment: None

Commissioner Foust adjourned the public meeting at 5:49 PM.

**DATE:** February 28, 2022  
**TO:** First 5 San Mateo County Commission  
**FROM:** Kitty Lopez, Executive Director  
**RE:** Approval of First 5 San Mateo County's FY 2021-22 Revised Budget and the Use of Ending Fund Balance (Ending Reserves\*) to Fund FY 2021-22 Revised Budget

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**ACTION REQUESTED**

Approval of First 5 San Mateo County's FY 2021-22 Revised Budget and the Use of Ending Fund Balance (Ending Reserves\*) to Fund FY 2021-22 Revised Budget.

**FY 2021-22 REVISED BUDGET ASSUMPTIONS**

- FY 2021-22 Initial Adopted Program Budget was approved by Commission on May 24, 2021 and was based on the approved SPIP FY 2020-23 Funding Allocations while F5SMC funding grant budgets for FY2021-22 were unknown at that time. Generally, those F5SMC funding grant budgets for FY2021-22 become available after F5SMC's accounting closes as of 6.30.2021.
- FY 2021-22 Revised Budget is necessary to honor grant executions and contract obligations; and to reflect the increase Revenues and increase Appropriations as agency won various new grant awards and new contract executions started.
- As per F5SMC's Strategic Plan FY 2020-23 approved by the Commission, the Commission approved higher Community Investments than its fiscal revenues by drawing down the Ending Fund Balance (Ending Reserves\*) to fund strategic initiatives. As a reminder, F5SMC has continued to draw down \$2-3 million per year, per the Strategic Plan FY 2020-23 and per Long-Term Financial Plan.
- COVID-19 and shelter-in-place order cause delayed execution of SPIP FY 2018-20 contracts and delayed contracting and implementation of SPIP FY 2018-20.
- Commission approved the implementation of SPIP FY2018-20 underspending fund carry-over to be in coordination with the 3-year time frame of the new strategic plan SPIP FY2020-23.
- FY 2021-22 Revised Budget occurs annually after the FY 2020-21 Financial Audit completion when under spending contracts and Audited Ending Fund Balance (as of 6.30.2021) become available.

**SUMMARY OF FY 2021-22 REVISED BUDGET**

Please read this Budget memo in conjunction of FY 2021-22 Revised Budget presented in Attachments 7A, 7B, and 7C (Schedule 1 and Schedule 2).

F5SMC's FY 2021-22 Revised Budget with the summary of budget changes as follows:

	<b>FY 2021-22 Adopted Budget</b>	<b>FY 2021-22 Revised Budget</b>	<b>Increase / (Decrease) \$</b>	<b>Increase / (Decrease) %</b>
Beginning Fund Balance (Beginning Reserves*)	9,829,030	12,844,713	3,015,683	31%
Total Revenues	6,260,000	6,704,025	444,025	7%
<b>Total Available Fund (Total Sources*)</b>	16,089,030	19,548,738	3,459,708	22%
Total Appropriations (Net Appropriations*)	7,931,259	8,421,683	490,424	6%
Ending Fund Balance (Ending Reserves*)	8,157,771	11,127,055	2,969,284	36%
Total Requirements*(Net Appropriations*+Ending Reserves*)	16,089,030	19,548,738	3,459,708	22%
Surplus / (Deficit) (Total Revenues – Net Appropriations*)	(1,671,259)	(1,717,658)	(46,399)	3%

*Total Sources\*, Net Appropriations\*, Reserves\*, Total Requirements\* are budget terminologies used by the County of San Mateo. Since March 2018, F5SMC has applied budget terminologies used by the County to the F5SMC Budget*

## FISCAL IMPACTS

Beginning Fund Balance is adjusted with an increase of \$3,015,683 as per the audited Ending Fund Balance as of 6.30.2021, F5SMC's audit report for the year ending 6.30.2021, page 33.

The net change of Ending Fund Balance (Ending Reserves\*) as a result of the budget adjustments in Total Revenues and Total Appropriations will be an increase of \$2,969,284 in the FY 2021-22 Revised Budget.

FY 2021-22 Revised Budget changes results in a Budget Deficit of \$1,717,658, that represents a higher Budget Deficit by \$46,399 than the initial Budget Deficit in the FY21-22 Initial Adopted Budget. Therefore, we will draw \$1,717,658 from the Reserves\* to fund the Community Investments.

For County Controller Office, the purposes of the Appropriations Transfer Request (ATR) for the F5SMC's FY2021-22 Revised Budget in the County Budget System, the Fund Balance has not been adjusted.

The Administrative Cost Rate is 10%, which remains below 15% of the approved Administrative Cost Policy for the FY 2021-22.

## ACTION REQUESTED

Review and Recommend Approval of First 5 San Mateo County's FY 2021-22 Revised Budget and the Use of Ending Fund Balance (Ending Reserves\*) in the amount of \$1,717,658 to Fund FY 2021-22 Revised Budget.



**FY 2021-22 REVISED BUDGET NARRATIVES** are presented in Attachments 7A, 7B, and 7C (Schedule 1 and Schedule 2).

**A. BEGINNING FUND BALANCE** (Beginning Reserves\*)

Beginning Fund Balance (Beginning Reserves\*) produce a net increase of \$3,015,683 or 31% increase.

- Beginning Fund Balance (Beginning Reserves\*) is adjusted as per the audited Ending Fund Balance as of 6.30.2021 as per F5SMC's audit report for FY 2020-21, page 33.

**B. TOTAL REVENUES**

Total Revenues produce a net increase of \$444,025 or 7% increase

- \$444,025 reflect Other Grant Revenues increases associating with F5CA Home Visiting grant execution of its final year and the new grant award (IMPACT HUB FY2021-22).

**C. TOTAL AVAILABLE FUND** (Total Sources\*)

Total Available Funds (Total Sources\*) produce a net increase of \$3,459,708 or 22% increase.

Major contributions to 22% net increase in Total Available Fund are attributable to adjusted Beginning Fund Balance as the outcome of F5SMC's audit report for the year ending 6.30.2021 and Other Grant award acquisition and executions.

**D. PROGRAM APPROPRIATIONS**

Total Program Appropriations produce a net increase of \$494,424 or 7% increase

Major contributions to 7% net increase in Total Program Appropriations are associated with higher F5SMC funding grant budgets for FY2021-22 and various Other Grant award executions.

SPIP FY 2020-23: net increase of \$405,094

- \$74,950 Increase in Resilient Family
- \$267,078 increase in Children Health
- \$314,862 increase in Quality Education and Early Learning
- (\$69,357) decrease in Evaluation
- (\$85,403) decrease in PAC
- (\$97,000) decrease in Emerging Project

SPIP FY 2018-20 Carry Over: net decrease of (\$218,966) (which reflects the balance of SPIP FY 2018-20 carry over to FY2021-22 after the reduction of SPIP FY2018-20 actual expenditures as of 6.30.2021).

- (\$12,201) decrease in Children Health Development - Carry Over
- (\$131,643) decrease in PAC - Carry Over
- (\$75,122) decrease in Emerging Project - Carry Over

Other Grants: net increase of \$312,296

- \$38,803 increase for the F5CA IMPACT grant appropriation.
- \$85,000 increase for the final year execution of F5CA Home Visiting grant.
- \$128,000 increase for the new FY 2021-22 IMPACT HUB TA Grant execution
- \$7,706 increase for the MHSA Prop 63 grant appropriation.
- (\$38,000) decrease for the Help Me Grow grant
- \$76,792 increases for the Special Needs grant appropriation.
- \$13,995 increase for the ACES Aware Grant execution

Net Decreases by (\$4,000)

- (\$4,000) decrease in the allocated Revised Operating Budget FY 2021-22 (Schedule 1)

**E. ADMINISTRATIVE APPROPRIATIONS**

Total Administrative Appropriations produce a net decrease of (\$4,000)

- (\$4,000) decrease in the allocated Revised Operating Budget FY 2021-22 (Schedule 1)

**F. REVISED OPERATING BUDGET FY 2020-21 (Schedule 1)**

Revised Operating Budget FY 2020-21 produce a net decrease of (\$8,000)

Net Increases by \$30,000

- \$10,000 increase in Department Employee Training Expenses
- \$20,000 increase in the Other Professional Services for the Race and Equity Consultation.

Net Decreases by (\$38,000)

- (\$35,000) decrease in Annual Facility Lease associating with 4-month free rent of the new Lease Amendment.
- (\$3,000) decrease in revised A87 Expenses.

**G. SALARIES AND BENEFITS (Schedule 2): No changes****H. TOTAL APPROPRIATIONS**

Total Appropriations (Net Appropriations\*) produce a net increase of \$490,424 or 6% increase

Major contributions to 6% net increase in Total Appropriations are associated with the increase appropriations for the implementation of SPIP FY2020-23 and various Other Grant execution.

**I. ENDING FUND BALANCE**

Ending Fund Balance (Ending Reserves\*) produce a net increase of \$2,969,284 or 36% increase

Major contributions to 36% net increase in Ending Fund Balance are associated with adjusted Beginning Fund Balance and various new Other Grant revenues.

**J. GLOSSARY**

## Attachment 7

1. Per the County Budget Act (Government Code §§ 29000-29144, 30200 and 53065), the County Manager's Office and the County Controller's Office have requested F5SMC include the language of the use of Fund Balance (Reserves\*) in its Budget memo to the Commission.
2. Since its inception, F5SMC has used different terminologies in its audit reports, budget documents, and Long-Term Financial Plan than those used by the County of San Mateo. The rationales are for (1) comparable terminologies used across F5SMC's audit reports, budget documents, and Long-Term Financial Plan; (2) for the usefulness of the general public; and (3) for consistent language used by First 5 California and by other First 5 Commissions throughout the State. Since March 2018, F5SMC added budgetary terminologies used by the County to F5SMC Budget.

## FIRST 5 SAN MATEO COUNTY

## FY 2021-22 REVISED BUDGET SUMMARY

	FY 21-22 Adopted Budget	FY 21-22 Revised Budget	FY21-22 Adopted Budget (+/-) vs. FY21-22 Revised Budget (\$)	FY21-22 Adopted Budget (+/-) vs. FY21-22 Revised Budget (%)
<b>BEGINNING FUND BALANCE (Beginning Reserves*)</b>	<b>9,829,030</b>	<b>12,844,713</b>	<b>3,015,683</b>	<b>31%</b>
<b>A. Interest Revenue</b>	<b>96,000</b>	<b>96,000</b>	-	0%
<b>B. Tobacco Tax Revenue</b>	<b>5,106,000</b>	<b>5,106,000</b>	-	0%
Tobacco Tax Revenue Fiscal Year Allocations	5,106,000	5,106,000		0%
<b>C. Other Grant Revenues</b>	<b>1,058,000</b>	<b>1,502,025</b>	<b>444,025</b>	42%
F5CA Other Grants / IMPACT Grant	502,000	620,000	118,000	24%
Non-Tobacco Tax Grants (DLP, PHD, SHD, MHTSA)	556,000	882,025	326,025	59%
<b>TOTAL REVENUES</b>	<b>6,260,000</b>	<b>6,704,025</b>	<b>444,025</b>	<b>7%</b>
<b>TOTAL AVAILABLE FUND (Total Sources*)</b>	<b>16,089,030</b>	<b>19,548,738</b>	<b>3,459,708</b>	<b>22%</b>
<b>PROGRAM APPROPRIATIONS</b>				
<b>D1. Strategic Plan Investment - SPIP FY 20-23</b>	<b>3,780,000</b>	<b>4,185,094</b>	<b>405,094</b>	11%
Community Investments (FE, CH&D, EL)	3,180,000	3,836,854	656,854	21%
Evaluation	113,000	43,643	(69,357)	-61%
Policy, Advocacy, & Communications (PAC)	487,000	304,597	(182,403)	-37%
<b>D2. Strategic Plan Investment - SPIP FY 18-20 Carry-Over</b>	<b>1,120,000</b>	<b>901,034</b>	<b>(218,966)</b>	-20%
Community Investments (FE, CH&D, EL)	400,000	387,799	(12,201)	-3%
Evaluation	350,000	350,000	0	0%
Policy, Advocacy, & Communications (PAC)	370,000	163,235	(206,765)	-56%
<b>E. Other Grants</b>	<b>954,000</b>	<b>1,266,296</b>	<b>312,296</b>	33%
F5CA Other Grants / IMPACT Grant	439,000	562,803	123,803	28%
Non-Tobacco Tax Grants (DLP, PHD, SHD, MHTSA)	515,000	703,493	188,493	37%
<b>F. Program Operations</b>	<b>1,265,149</b>	<b>1,261,149</b>	<b>(4,000)</b>	<b>0%</b>
Program Shared Operating Budget	206,300	202,300	(4,000)	-2%
Program Staff S&B & Shared Admin Staff Time	873,309	873,309	0	0%
Evaluation Staff S&B	185,540	185,540	0	0%
<b>Total Program Appropriations (D1+D2+E+F)</b>	<b>7,119,149</b>	<b>7,613,573</b>	<b>494,424</b>	<b>7%</b>
<b>ADMIN APPROPRIATIONS</b>				
<b>G. Admin Shared Operating Budget</b>	<b>206,300</b>	<b>202,300</b>	<b>(4,000)</b>	<b>-2%</b>
<b>H. Admin Staff S&amp;B</b>	<b>605,810</b>	<b>605,810</b>	<b>0</b>	<b>0%</b>
<b>Total Admin Appropriations (G+H)</b>	<b>812,110</b>	<b>808,110</b>	<b>(4,000)</b>	<b>0%</b>
<b>TOTAL APPROPRIATIONS (Net Appropriations*)</b>	<b>7,931,259</b>	<b>8,421,683</b>	<b>490,424</b>	<b>6%</b>
Surplus / (Deficit) (Total Revenues - Total Appropriations)	(1,671,259)	(1,717,658)	(46,399)	
<b>ENDING FUND BALANCE</b>	<b>8,157,771</b>	<b>11,127,055</b>	<b>2,969,284</b>	<b>36%</b>
<b>Total S&amp;B</b>	<b>1,664,659</b>	<b>1,664,659</b>	-	-

FIRST 5 SAN MATEO COUNTY

FY 2021-22 REVISED BUDGET DETAILS

	ORG/ACCT#	FY21-22 Adopted Budget	FY 21-22 Revised Budget	FY21-22 Revised Budget (+/-) vs. FY20-21 Adopted Budget (\$)	FY21-22 Revised Budget (+/-) vs. FY20-21 Adopted Budget (%)	Notes to FY2021-22 Revised Budget
<b>BEGINNING FUND BALANCE (Beginning Reserves*)</b>		<b>9,829,030</b>	<b>12,844,713</b>	<b>3,015,683</b>	<b>31%</b>	Beginning Fund Balance Adjustments to reconcile with the outcome of F5SMC's audit report 6.30.2021
<b>A. Interest Revenue</b>	19510-1521	<b>96,000</b>	96,000	0	0%	
<b>B. Tobacco Tax Revenue</b>		<b>5,106,000</b>	<b>5,106,000</b>	0	0%	
Tobacco Tax Revenue Fiscal Year Allocations	19510-1861	5,106,000	5,106,000	0	0%	
<b>C. Other Grant Revenues</b>		<b>1,058,000</b>	<b>1,502,025</b>	<b>444,025</b>	<b>42%</b>	
F5CA IMPACT Grant FY20-23	19510-1861	400,000	400,000	0	0%	
F5CA Home Visiting Grant FY20-22	19510-1861	102,000	220,000	118,000	116%	Y2 of full grant execution.
F5SF IMPACT HUB TA FY21-22	19510-2643		138,998	138,998		New grant award for FY21-22
County of San Mateo BHRS - Mental Health Services MHSA Prop 63	19510-2643	85,000	85,000	0	0%	
David Lucile Packard- Help Me Grow FY20-22	19510-2643	75,000	75,000	0	0%	
Sequoia Healthcare District - Special Needs Grant FY20-23	19510-2643	339,000	339,000	0	0%	
Sequoia Healthcare District - Mental Health Grant FY20-23	19510-2643	57,000	57,000	0	0%	
Aurrera Health Group - ACES Aware	19510-2643		15,277	15,277		
CHI Refund	19510-2643		171,750	171,750		
F5SMC Wellness Grant	19510-2658			0		
Miscellaneous Reimbursements	19510-2647			0		
<b>TOTAL REVENUES</b>		<b>6,260,000</b>	<b>6,704,025</b>	<b>444,025</b>	<b>7%</b>	
<b>TOTAL AVAILABLE FUNDS (TOTAL SOURCES*)</b>		<b>16,089,030</b>	<b>19,548,738</b>	<b>3,459,708</b>	<b>22%</b>	
<b>APPROPRIATIONS</b>						
<b>PROGRAM APPROPRIATIONS</b>						
<b>D1. Strategic Plan Investment - SPIP FY 20-23</b>		<b>3,780,000</b>	<b>4,185,094</b>	405,094	11%	Includes underspending funds from FY20-21
Family Engagement	19540-6125	1,060,000	1,134,950	74,950	7%	
Children Health & Development	19540-6156	1,060,000	1,327,078	267,078	25%	
Early Learning	19540-6263	1,060,000	1,374,826	314,826	30%	
Grant Management and Other Evaluation Projects	19540-6265	113,000	43,643	(69,357)	-61%	
Policy Advocacy, Communications & Systems Change	19540-6814	380,000	294,597	(85,403)	-22%	MB to provide VIVA Revised Budget for FY21-22 or amendment
Emerging Projects	19540-6814	107,000	10,000	(97,000)	-91%	Pending planning and coordination with ARPA system integration and strategic planning
<b>D2. Strategic Plan Investment - SPIP FY 18-20 Carry-Over</b>		<b>1,120,000</b>	<b>901,034</b>	<b>(218,966)</b>	<b>-20%</b>	The implementation of the SPIP FY 2018-20 Carry Over Funds are in coordination within the 3-year time frame of the new strategic plan FY 2020-23, as per the Commission approval.
Children Health & Development - Carry Over	19540-6156	300,000	287,799	(12,201)	-4%	
Early Learning - Carry Over	19540-6263	100,000	100,000	0	0%	
Other Evaluation Projects - Carry Over	19540-6265	350,000	350,000	0	0%	FY20-21 actual expenditures was \$199K. Balance SPIP FY18-20 carry over will be expended through 6.30.2023 or return back to Fund Balance.
PAC - Carry Over	19540-6814	250,000	118,357	(131,643)	-53%	
Emerging Projects - Carry Over	19540-6814	120,000	44,878	(75,122)	-63%	

	ORG/ACCT#	FY21-22 Adopted Budget	FY 21-22 Revised Budget	FY21-22 Revised Budget (+/-) vs. FY20-21 Adopted Budget (\$)	FY21-22 Revised Budget (+/-) vs. FY20-21 Adopted Budget (%)	Notes to FY2021-22 Revised Budget
<b>E. Other Grants</b>		<b>954,000</b>	<b>1,266,296</b>	<b>312,296</b>	<b>33%</b>	
F5CA IMPACT Grant	19540-6126	350,000	388,803	38,803	11%	
F5CA Home Visiting Grant		89,000	174,000	85,000	96%	Final year of the 2-year grant
F5SF IMPACT HUB TA FY21-22	19540-6126		128,000	128,000		New grant award
County of San Mateo BHRS - Mental Health Services MHSA Prop 63	19540-6131	64,000	71,706	7,706	12%	Final year of the 3-year grant
Peninsula Healthcare District - HMG Call Center Grant calendar year 2021	19540-6131	42,000	42,000	0	0%	Calendar year grant
David Lucile Packard- Help Me Grow	19540-6131	58,000	20,000	(38,000)	-66%	Calendar year grant
Sequoia Healthcare District - Special Needs Grant	19540-6131	317,000	393,792	76,792	24%	FY20-21 underspending fund carry over to FY21-22
Sequoia Healthcare District - Mental Health Grant	19540-6131	34,000	34,000	0	0%	
Aurrera Health Group - ACES Aware	19540-6131		13,995	13,995		FY20-21 underspending fund carry over to FY21-22
<b>F. Program Operations</b>		<b>1,265,149</b>	<b>1,261,149</b>	<b>(4,000)</b>	<b>0%</b>	
Program Shared Operating Budget		206,300	202,300	(4,000)	-2%	
Program Staff S&B & Shared Admin Staff Time		873,309	873,309	0	0%	
Evaluation Staff S&B		185,540	185,540	0	0%	
<b>Total Program Appropriations (D1+D2+D3+E+F)</b>		<b>7,119,149</b>	<b>7,613,573</b>	<b>494,424</b>	<b>7%</b>	
<b>ADMIN APPROPRIATIONS</b>						
G. Admin Shared Operating Budget		206,300	202,300	(4,000)	-2%	
H. Admin Staff S&B		605,810	605,810	0	0%	
<b>Total Administrative Appropriations</b>		<b>812,110</b>	<b>808,110</b>	<b>(4,000)</b>	<b>0%</b>	
Administrative Cost Rate %		10%	10%			
<b>TOTAL APPROPRIATIONS (NET APPROPRIATIONS*)</b>		<b>7,931,259</b>	<b>8,421,683</b>	<b>490,424</b>	<b>6%</b>	
<b>ENDING FUND BALANCE (ENDING RESERVES*)</b>		<b>8,157,771</b>	<b>11,127,055</b>	<b>2,969,284</b>	<b>36%</b>	

**Color Coding**

Shared Budget/Shared Cost	
Revenue ; Fund Balance	
Appropriations	
Salaries & Benefits	

Schedule 1- FY 2021-22 REVISED OPERATING BUDGET

Attachment 7C

	ORG / ACCT#	FY21-22 Adopted Budget	FY21-22 Revised Budget	FY21-22 Revised Budget (+/-) vs. FY20-21 Adopted Budget (\$)	FY21-22 Revised Budget (+/-) vs. FY20-21 Adopted Budget (%)	Notes to FY2021-22 Revised Budget
<b>I. Services and Supplies</b>						
Outside Printing & Copy Svc	19510-5191	2,000	2,000	0	0%	
General Office Supplies	19510-5193	8,000	8,000	0	0%	
Photocopy Lease & Usage	19510-5196	5,000	5,000	0	0%	
Computer Supplies	19510-5211	15,000	15,000	0	0%	Software licenses and Place holder for emergency IT equipment
County Memberships - (e.g. F5 Assn Dues)	19510-5331	15,000	15,000	0	0%	
Auto Allowance	19510-5712	11,000	11,000	0	0%	
Meetings & Conference Expense	19510-5721	10,000	10,000	0	0%	
Commissioners Meetings & Conference Exp	19510-5723	5,000	5,000	0	0%	
Other Business Travel Expense	19510-5724	10,000	10,000	0	0%	Reopening business travel
Dept. Employee Training Expense	19510-5731	7,000	17,000	10,000	143%	Staff leadership training
Wellness grant	19510-5856	0	0	0	0%	
Other Professional Services	19510-5858	30,000	50,000	20,000	67%	Race and Equity consultation (\$39K). Place holder \$10K
<b>Sub Total - Services &amp; Supplies</b>		<b>118,000</b>	<b>148,000</b>	<b>30,000</b>	<b>25%</b>	
<b>II. Other Charges</b>						
Telephone Service Charges	19510-6712	5,500	5,500	0	0%	Include direct Communication Services
Automation Services - ISD	19510-6713	57,000	57,000	0	0%	
Annual Facilities Lease	19510-6716	105,000	70,000	(35,000)	-33%	4-months free rent as new Lease Amendment
General Liability Insurance	19510-6725	10,500	10,500	0	0%	Liability Insurance increase
Official Bond Insurance	19510-6727	800	800	0	0%	
Human Resources Services	19510-6733	2,000	2,000	0	0%	County Human Resources training
Countywide Security Services	19510-6738	800	800	0	0%	
All Other Service Charges	19510-6739	60,000	60,000	0	0%	include Card Keys, Audit, County Counsel and Accounting Services
A-87 Expense	19510-6821	53,000	50,000	(3,000)	-6%	Revised AB87 allocation
<b>Sub Total - Other Charges</b>		<b>294,600</b>	<b>256,600</b>	<b>(38,000)</b>	<b>-13%</b>	
<b>Total Operating Budget</b>		<b>412,600</b>	<b>404,600</b>	<b>(8,000)</b>	<b>-2%</b>	
<b>Program Shared Operating Budget</b>		<b>206,300</b>	<b>202,300</b>	<b>(4,000)</b>	<b>-2%</b>	Allocation rate 50%
<b>Admin Shared Operating Budget</b>		<b>206,300</b>	<b>202,300</b>	<b>(4,000)</b>	<b>-2%</b>	Allocation rate 50%

Schedule 2 - FY 2021-22 REVISED SALARIES & BENEFITS BUDGET

Program Staff & Shared Admin Staff		873,309	873,309	0	0%	27% Admin staff time allocated to Program
Evaluation Staff		185,540	185,540	0	0%	
Admin Staff		605,810	605,810	0	0%	
<b>Total Salaries and Benefits</b>		<b>\$ 1,664,659</b>	<b>\$ 1,664,659</b>	<b>\$ -</b>	<b>0%</b>	

**DATE:** February 28, 2022  
**TO:** First 5 San Mateo County Commission  
**FROM:** Kitty Lopez, Executive Director  
**RE:** Presentation: Family Story Project: Conversations with Families with Young Children

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### **ACTION REQUESTED**

No action requested. For discussion only.

### **BACKGROUND**

Family voices are critical to dismantling systemic inequities in children’s healthy development, to inform policy makers, and to influence decisions around the types of investments families need to thrive. With the belief that those closest to the challenges also need to be closest to the solutions, First 5 San Mateo County started the Family Story Project – an opportunity to engage in dialogue and conversations with working families who are raising young children in under-resourced communities. While San Mateo County overall has some of the best health outcomes in the state<sup>1</sup>, these experiences are not shared equally. San Mateo County has greater income inequality than any other county in California, with the average income of the top 1% being nearly 50 times greater than the average income of the bottom 99%<sup>2</sup>.

In January 2020, First 5 San Mateo County partnered with the Silicon Valley Community Foundation to launch these community conversations with families. The idea was for families to speak candidly in person, to share their perspectives and experiences. Then COVID-19 hit, and conversations were held remotely. The pandemic forced a new way of life upon all of us, and highlighted the extreme disparities in wealth, and access to resources working families face daily. It underlined the difference between the secure and those who are vulnerable. Conversations were facilitated by Leticia Gonzalez and Eliot Margolis and were held remotely in Spanish and English. The project included 10 community conversations conducted remotely in Zoom, in English and Spanish with 40 parents throughout the county. Families lived in East Palo Alto, North Fair Oaks, Redwood City, Foster City, San Mateo, Daly City, Belmont, South San Francisco, Pacifica, San Bruno, and Half Moon Bay. We send gratitude and appreciation to all parents who gave their time and perspective.

Today’s presentation will provide an overview of the summary report and the one page advocacy document which includes recommendations for incorporating families’ perspectives and suggested strategies to support families, services, and systems. (See Attachment 8.1) Through the lens of equity, “Systems change is about shifting the conditions that are holding the problems in place” ( FSG, 2018).

### **ACTION REQUESTED**

No action requested. For discussion only.

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<sup>1</sup>University of Wisconsin Population Health Institute. (2018). *County Health Rankings & Roadmaps*. Retrieved from countyhealthrankings.org: <http://www.countyhealthrankings.org/app/california/2018/rankings/san-mateo/county/outcomes/overall/snapshot>

<sup>2</sup> Price, E. S. (2018, July 19). *epi.org*. Retrieved from Economic Policy Institute: <https://www.epi.org/publication/the-new-gilded-age-income-inequality-in-the-u-s-by-state-metropolitan-area-and-county/>



# San Mateo County Families Getting through COVID-19: How Community Leaders & Policymakers Can Drive the Change We Need



Throughout the COVID-19 pandemic, families have weathered unforeseen impacts with strength. Forty families from 10 communities in San Mateo County shared their perspectives on the challenges they faced during the pandemic, the strengths that helped them overcome obstacles, and their hopes and dreams for their children. Even as families have learned to navigate this pandemic, they have been working within systems that leave gaps in support. Leaders in our community can help create alignment and transform how our county's services, supports, and systems work for young children and families in San Mateo County.

## Different Families Faced Different Challenges

As families told their stories of navigating the pandemic, four key themes emerged.

*"Managing four children at home (a child just entering middle school, a child just entering Kindergarten, a preschooler in Head Start and a baby). I have lost myself for a little bit because I am so stressed out. They have not done well with remote learning. It has been very intense and difficult on me."*

**1** Parenting Challenges

**2** Financial Insecurity

**3** Language Barriers

**4** Fear and Isolation

*"The pandemic didn't get us all the same, we are more exposed, we must be on the streets every day and others can just work from home and life continues as usual. We have to leave our children; we can't work and take care of them at the same time like it is for other families."*

## Our San Mateo County Families

The families who shared their stories were racially diverse and included families raising children with special needs, single mothers, monolingual Spanish families, undocumented and mixed status families (parents are undocumented, children were born in the USA), and at least three families who have recently experienced homelessness. These interviews were conducted by the Silicon Valley Community Foundation.

Families lived in East Palo Alto, North Fair Oaks, Redwood City, Foster City, San Mateo, Daly City, Belmont, South San Francisco, Pacifica, San Bruno, and Half Moon Bay.

*"The children around us don't necessarily have to be as affected by our grownup problems if we get the proper support that we need as adults."*



# Investing in Equitable Safety Nets

These families welcomed every opportunity they got to do better, to work harder, to learn and grow for themselves and their children. Their stories reflected their sense of perseverance, a desire to lift their families and their communities up. They contribute so much despite all the hurdles they must navigate.



“ At the end of the day, I just want [my children] to feel healthy, to feel happy, to feel loved, but most importantly, I want them to love and respect themselves... ”

## Recommendations: Because Those Closest to the Problems Are Closest to the Solutions

### Increase level of investment to align available support systems locally

- Invest in community navigator staff housed in community-based organizations in priority zip codes.
- Make multi-year, full-cost grants to support the operation of small nonprofit organizations who are providing family-centered solutions in low-income zip codes.
- Capture family voices on an ongoing basis to inform policy decisions and community investments.
- Fund after school & summer programs with enrichment activities for young children.

### Advocate for families that need support at all levels

- Support organizations working with undocumented families and increase access to services and resources.
- Increase partnerships to bridge the support gap of undocumented families.
- Advocate for affordable and high-quality early care and learning experiences for all children.
- Build bridges between schools and community organizations supporting the needs of the adults.
- Improve public transportation and subsidize use for working families.
- Offer responsive, flexible, and non-traditional hours to meet the needs of working families.

**FIRST 5 SAN MATEO COUNTY (F5SMC)  
REPORT OF THE EXECUTIVE DIRECTOR  
FEBRUARY 2022**

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**STRATEGIC INVESTMENT FOCUS AREAS – UPDATE**

**QUALITY CARE AND EDUCATION**

**San Mateo County Childcare Virtual Event**

On February 7, 2022, State Assemblymember and Speaker pro Tempore, Kevin Mullin, and Honorary Co-Chair of Build Up San Mateo County hosted a well-attended virtual event to highlight the childcare work being done in San Mateo County and the collaborative partnerships during the COVID-19 pandemic. Kitty Lopez, F5SMC’s Executive Director, Michelle Blakely, F5SMC’s Deputy Director, Sarah Kinahan, Child Care Partnership Council’s Coordinator, David Fleishman, 4C’s Executive Director, and Christopher Maricle, Head Start California’s Executive Director represented the panel providing updates such as federal and state funding, childcare legislations, impact of pandemic to childcare industry, workforce shortage, and San Mateo County Child Care Response team efforts. The virtual event was recorded and can be watched on YouTube <https://youtu.be/l0evxmdVOn8>

**HEALTHY CHILDREN**

**Children’s Dental Health Month:**

The month of February is National Children’s Dental Health Month, designated by the American Dental Association to raise awareness of the importance of oral health. First 5 SMC is joining other members of the SMC Oral Health Coalition and the Children’s Oral Health Workgroup to share out important messages via social media platforms. The graphics being used by partners this year were designed by former First 5 SMC staff member Mai Le.



**RESILIENT FAMILIES**

**Friday Café (Community and Family Engagement) Update:**

Friday Cafés are held the fourth Friday of each month throughout the school year from 9:00 to 10:30 virtually (until further notice) and all who work at the intersection of early learning and family support are welcome.



February Registration Link:

<https://smcoe.zoom.us/meeting/register/tJUlfuGgrTijEtXpr6te96VuiYalB4pAhdan>

The winter Friday Café series “UnMask Connections” was held on January 28<sup>th</sup> with Conversation Catalyst, Ashanti Branch, Executive Director and Founder of The Ever Forward Club. Ashanti helped attendants uncover personal stories and experiences that are often held in private, rather than shared, in order to preserve one’s “mask” identity. Participants began to explore the mask they project to others and why, versus the internal experience they feel; the differences were astounding and deeply meaningful.

In part two of the winter series, on February 25, 2022, participants will continue the UnMasking journey with Ashanti’s guidance. Participants will create deeper connections through lowering their mask and letting more of their authentic selves show. This is helpful personally, but can also facilitate better engagement with the families Friday Café participants serve. Holding similar brave spaces for the families Friday Café participants serve can in turn, help families to UnMask themselves, leading to deeper trust and more in-tune service provision.

### **IZZY’s (formerly IHSD) Second Family Development Credential Training:**

Each year Izzy provides a Family Development Credential (FDC) Training for their staff. The FDC is a major national initiative that provides front-line family engagement workers with the skills and competencies needed to empower families, help them attain self-reliance, and interdependence with communities. With funding from F5SMC’s Resilient Families portfolio, the training was expanded to provide ten training slots each year for community partners interested in becoming credentialed. These slots are fully underwritten by F5SMC and are no cost to participants. This year’s FDC training is the second in which F5SMC-funded slots are included and began in January of 2022. The training is comprised of 90 hours of interactive classroom instruction based on Empowerment Skills for Family Workers curriculum, creation of a Skills Portfolio with support of a Portfolio Advisor, and a credentialing exam. Our sincere thanks to Leanne Hay, Izzy’s Children’s Services Manager, for coordination and delivery of the very successful FDC training. (See Attachment 9.1)

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## **POLICY & ADVOCACY UPDATES**

### **“San Mateo County Child Care Industry Recovering”**

On February 7, 2022, *The Daily Journal*, published an article “San Mateo County Child Care Industry Recovering,” by Sierra Lopez highlighting the panel discussions from SMC child care leaders regarding the long-term solutions to help the child care industry in San Mateo County. The article features commentary by Kitty Lopez and Michelle Blakely. (See Attachment 9.2)

### **Continuous Coverage for the First Years of Life**

The First 5 Association of California, The Children’s Partnership, Children Now, March of Dimes, First 5 Center for Children’s Policy, and Maternal and Child Health Access released a fact sheet, “Continuous Coverage for the First Years of Life,” on the importance of continuity of care for young children. (See Attachment 9.3)

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## **FIRST 5 CALIFORNIA & FIRST 5 ASSOCIATION UPDATES**

### **First 5 Association of California Advocacy Day**

On April 19, 2022, the First Association Advocacy Day is going virtual again! Advocacy Day has been a great opportunity to meet with our local SMC Assembly and Senate lawmakers to

emphasize the importance of prioritizing young children and families in all aspects of the state policy and budget. Kitty Lopez and Michelle Blakely will be participating again this year.

### **First 5 Association of California 2022 Policy Agenda**

The First 5 Association released its 2022 Policy Agenda for the Whole Child and Family which includes its policy priorities in Infant & Early Childhood Mental Health, Resilient Families, Comprehensive Health & Development, and Quality Early Learning. (See *Attachment 9.4*)

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## **COMMUNITY AND STATEWIDE EVENTS & UPDATES**

### **Immigrant Inclusion Survey**

The San Mateo County Office of Community Affairs launched a survey that will help San Mateo County develop the first-ever Immigrant Inclusion Strategic Plan! F5SMC notified grantees, partners and an engaged social media announcing the survey.

#### **Did you know that one in three San Mateo County residents is an immigrant?**

Local communities across the country, including San Mateo County, have long seen the positive effects of a growing immigrant population.

**It is the hope that** everyone who lives, works, or goes to school in San Mateo County **who identifies as an immigrant** takes the survey. This **includes but isn't limited** to naturalized citizens, legal permanent residents, DACA recipients, and undocumented residents, to name a few. The survey is available in 12 languages to truly be inclusive of all the immigrant populations we see in San Mateo County. The 12 languages include English, Spanish, Chinese, Tagalog, Russian, Hindi, Arabic, Portuguese, Korean, Japanese, Vietnamese, and Tongan. Responses will be used to create recommendations that will improve the lives of all, regardless of race/ethnicity, immigration status, age, ability, sexual identity, or other identity or characteristic.



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## **COMMUNICATIONS**

### **Social Media and Analytics Report (See Attachment 9.5)**

# FAMILY DEVELOPMENT CREDENTIAL (FDC) INFO SESSION

December 7th & 9th, 2021  
@ 5pm

The FDC Program is a professional development course and credentialing program to learn and/or enhance skills of strength-based family support with families.

This FDC course is offered to San Mateo County individuals that would like to build their professional skills of partnering with families. Staff members work with families across the life span including families with young children, teen parents, retired people, people with disabilities, and many other groups are perfect for this class.

#### PROGRAM EXPECTATIONS:

- **complete 90 hours of interactive classroom**
- **instruction based on the Empowerment Skills for Family Workers curriculum**
- **prepare a Skills Portfolio with support of a portfolio advisor**
- **pass a program credentialing exam.**

#### FREE PROGRAM AND AMAZING OPPORTUNITY!

This FDC course is being offered through partnerships by IZZI INC & FIRST FIVE and is free (\$400.00 value) for 15 participants (not including college units)!

#### INSTRUCTOR:

LEANNE HAY (IZZI Children's Services Manager)

#### FDC PORTFOLIO ADVISOR:

MOANA LUPE (Izzi Family And Community Engagement Coordinator)

EMAIL [LHAY@IZZIEARLYED.ORG](mailto:LHAY@IZZIEARLYED.ORG) FOR ZOOM LINK!

**WOULD YOU LIKE TO BUILD YOUR SKILLS IN  
PARTNERING WITH FAMILIES?**

**STRENGTH-BASED FAMILY SUPPORT  
TRAINING IN A SELF- REFLECTIVE  
APPROACH**

**HIGHLY VALUED CREDENTIAL  
THROUGHOUT THE EARLY  
EDUCATION COMMUNITY**



## *Some Questions and Answers about the Family Development Credential Program (FDC™)*

### ***What is the FDC?***

#### **An interagency strengths-based training and credentialing program for frontline family workers.**

The Family Development Training and Credentialing Program (FDC) is a major National initiative that provides frontline workers with the skills and competencies they need to empower families to attain a healthy self-reliance and interdependence with their communities.

This interagency training and credentialing program is available in communities across the state and country to frontline workers from all public, private and non-profit service systems (e.g. home visitors, case managers, family resource center workers, community health workers, and teacher aides).

The FDC was developed under a partnership between the New York State Dept. of State, Division of Community Services and Cornell University's College of Human Ecology, where the curriculum was developed. National FDC trains official FDC instructors and the University of Connecticut issues the credential.

Fifteen state agencies working as the Interagency Work Group on Family Support and Empowerment under the leadership of the NYS Council on Children and Families, have advised the FDC. There are now more than 5,000 frontline workers who have earned the Family Development Credential.

Many services and interventions, being fragmented, problem-specific, and crisis driven, are not as effective as they could be at helping families achieve long lasting changes in their lives.

### ***Why is the FDC necessary?***

For too long, services have been available only when a family is in crisis or about to disintegrate. Public interventions have focused on "rescuing and fixing" families rather than helping families develop their capacity to solve problems and achieve long-lasting self-reliance.

Now on both state and national levels, families, service providers and policy makers, are joining together to reorient the way services are delivered toward a more family-focused and strengths-based approach.

The FDC is critical to achieving this goal, because it can ensure that frontline workers across all systems are using the same highly effective approach to helping families. The FDC will provide all state and local agencies with accessible, high quality training resources.

### ***What is the FDC achieving?***

*For families* - Services are more focused on helping families use their strengths and set and reach their own goals.

*For frontline workers* - The FDC offers quality, sequential training enabling workers to develop skills and competencies needed to work effectively with families. The FDC also provides a career pathway or avenue into college for workers with little or no formal training or higher education.

*For States* - With its interagency nature, the FDC is transforming the way agencies work with families - fostering collaboration, reducing duplication, and providing a way to streamline training for frontline workers. The FDC credential is recognized by all major family-serving agencies.

### ***What is the family development process?***

1. The family develops a partnership with a family

development worker.

2. A family development worker helps the family assess its needs and strengths; this is an ongoing process.
3. The family sets its own major goal (such as getting off welfare, or providing healthy care of a disabled family member) and smaller goals working toward the major goal, and identifies ideas for reaching them.
4. The family development worker helps the family make a written plan for pursuing goals with some tasks being the responsibility of the family members and some the worker's. Accomplishments are celebrated, and the plan is continually updated.
5. The family learns and practices skills needed to become self-reliant.
6. The family uses services as stepping-stones to reach their goals.
7. The family's sense of responsible self-control is restored. The family (and each individual within the family) is strengthened by the family development process so they are better able to handle future challenges.

### ***What is the FDC curriculum?***

The comprehensive curriculum of the FDC course is *Empowerment Skills for Family Workers*, developed by Cornell University with input from families, frontline workers, program supervisors, and policy makers who attended focus groups, reviewed drafts and participated in pilot tests. See pages 4-5 for competencies taught by this curriculum.

There are three documents:

Worker Handbook- the core of the curriculum, highly readable.

Instructor's Manual - easy-to-use guide to over 90 hours of interactive course sessions.

Portfolio Advisor's Manual - for FDC portfolio advisors to assist workers in doing skills practices and preparing for the FDC credential.

### ***Who can purchase and use this curriculum?***

FDC instructors, portfolio advisors and workers who are part of the official FDC credentialing program; including agencies and coalitions, community colleges and four-year colleges. (To prepare workers to earn the FDC credential a training program must have at least one instructor who has attended an FDC Instructor's and Portfolio Advisors Institute).

- Individuals who wish to do self-study
- Agencies or coalitions who wish to offer informal workshops in their communities
- Agencies who want to incorporate it into their own ongoing training. Inquire about receiving permission to adapt the materials.

### ***How can a worker get this training and earn the FDC credential?***

Comprehensive FDC training and portfolio advisement is available through official programs in local communities across the state.

The first FDC credentials were issued by Cornell's School of Continuing Education in Dec. 1997. To this time, nineteen states have adapted or replicated the FDC and have established training and credentialing systems.

### ***What does a worker need to do to receive the FDC credential?***

**FDC Course** - Participate in approximately 90 hour course over several months, led by an official FDC instructor.

**Portfolio Advisement** - Students work with a trained portfolio advisor associated with the course, who provides guidance to complete required portfolio work.



**Portfolio Development** - Prepare a portfolio that contains, for each of ten chapters:

- Responses to at least three “Activities to Extend Your Learning” from the Worker Handbook.
- Plan and carry out at least one skills practice for each chapter;
- Share this with your portfolio advisor and document it in the portfolio.

The last section of the portfolio contains three Family Development Plans that the worker creates with one family, to demonstrate an ability to work with family member(s) as they choose a goal and begin to take steps toward that goal.

**Examination** - Successfully complete an examination based on the Worker’s Handbook.

Costs include a fee charged by the local FDC program (fees vary, averaging around \$850), the 2015 Worker Handbook (\$45) a \$300 credentialing fee.

***What if we just want to attend the course and not earn the credential?***

Your agency can purchase the curriculum and offer informal training for your own and other community agencies’ workers. To offer the course leading to the credential, someone would need to become part of the official FDC Instructors’ network.

Workers can also buy the Worker’s Handbook and do self-study on their own or with co-workers.

***What competencies does Empowerment Skills for Family Workers teach?***

The ten chapters of the Worker’s Handbook, and ten corresponding modules of the Instructor’s Manual address the following FDC skills and competencies:

**Chapter 1: Family Development: A Sustainable Route To Healthy Self- Reliance**

A bone-deep longing for Freedom and self-respect

Beyond “Providing Services  
Does case management empower families?  
Core principles of family development  
Power and family development  
The family development plan  
Your mind and your brain  
The importance of family context  
Putting it all together as a family development worker

**Chapter 2: Communicating with Skill and Heart**

Communicating with skill and heart  
Empathy: putting yourself in their shoes  
Understanding nonverbal communications  
Finding a good balance between listening and expressing yourself  
Listening well  
Saying what you mean clearly and respectfully  
Promoting cooperative solutions to conflicts  
Handling blame and criticism constructively  
Confronting people constructively when necessary  
Communicating about “hot topics”  
Working with families with language barriers and low levels of literacy  
Communicating using technology

**Chapter 3: Presence and Mindfulness: Cornerstone of Healthy Relationships**

Presence  
Shifting your focus from “doing” to “being”  
Mindfulness-based stress reduction  
Mindfulness practice exercises  
Practical strategies for mindful family development work

**Chapter 4: Taking Good Care of Yourself**

Clarifying a personal vision for your work  
Creating a support system at work  
Creating a support system for yourself  
Creating your own stress-reduction and wellness program  
Balancing work and family life  
Family Financial Literacy

**Chapter 5: Our Diverse World**

Living in this diverse world

What is culture?

Why is an understanding of diversity and oppression important to family development?

Why is cultural competence important for family development workers?

Language and cross-cultural communication

Language and family dynamics

Displacement and immigration

Barriers to a culturally competent society

Discussing diversity

Exploring your own culture

Expanding your ability to work respectfully with other cultures

Helping your agency to develop cultural competence

**Chapter 6: Strength-Based Assessment**

What is assessment?

Basic principles of strength-based assessment

Confidentiality

The family circles assessment

Helping your agency choose strength-based assessment tools

**Chapter 7: Helping Families Set and Reach Their Own Goals**

Establishing mutually respectful, trusting relationships with families

Helping families build on their own strengths

How to avoid families becoming dependent on you

When and how to end the relationship

**Chapter 8: Helping Families Access Specialized Services**

Helping families use specialized services to become self-reliant

Identifying specialized services and helping families gain access to them

Recognizing the need for specialized services

Making and following through on referrals

Supporting family members in specialized programs

Recognizing, referring, and supporting families needing specialized services

Supporting military families and veterans

Other specialized services commonly needed by families your agency works with

Families with many complex problems

**Chapter 9: Home Visiting**

Home visiting: A unique relationship

A family development approach to home visiting

How to enter a family's home respectfully the first time and on future visits

How to establish the purpose of the home visit

Safety issues

TV, dogs, another cup of coffee: Handling the practical matters of home visiting

Home visits in child protection or other domestic violence situations

Ongoing visits

**Chapter 10: Collaboration and Community Support**

The importance of Community

Helping families identify and strengthen their informal helping networks

Support and advocacy groups

Family conferences

Teaching leadership skills to family members

Collaboration

Building respectful relationships with community service partners

Coordination and cooperation: The first steps toward collaboration

Different levels of collaboration: Individuals, front-line workers, and systems

Keys to successful collaboration

Practical pitfalls of collaboration-and how to turn them into advantages

The bigger picture: How agency, state, and national policies affect your work

Interagency training: A key to interagency collaboration

## Core principles underlying the empowerment and family support approach to family development

1. All people, and all families, have strengths.
2. All families need and deserve support. The type and degree of support each family needs varies throughout the life span.
3. Most families are not dependent on long-term public support. Neither are they isolated. They maintain a healthy interdependence with extended family, friends, other people, religious organizations, community groups, schools and agencies, and the natural environment.
4. Diversity (race, ethnicity, gender, class, family form, religion, physical and mental ability, age, sexual orientation) is an important reality in our society, and is valuable. Family workers need to develop competence in working effectively with people who may be different from them or come from groups that are often not respected in our society.
5. The deficit model of family assistance, in which families must show inadequacy in order to receive services (and professionals decide what is best for families), is counter-productive to helping families move toward healthy self-reliance.
6. Changing from the deficit model to the family development approach requires a whole new way of thinking about social services, not simply more new programs. Individual workers cannot make this shift without corresponding policy changes at agency, state, and federal levels.
7. Families need coordinated services in which all the agencies they work with use a similar approach. Collaboration at the local, state, and federal levels is crucial to effective family development.
8. Families and family development workers are equally important partners in the empowerment process, with each contributing important knowledge. Workers learn as much as the families from the process.
9. Families must choose their own goals and methods of achieving them. Family development workers' roles include assisting families in setting reachable goals for their own self-reliance, providing access to services needed to reach these goals, and encouragement.
10. Services are provided in order for families to reach their goals, and are not themselves a measure of success. New methods of evaluating agency effectiveness are needed that measure family and community outcomes, not just the number of services provided.
11. In order for families to move out of dependency, helping systems must shift from a "power over" to a "power with" paradigm. Human service workers have power (which they may not recognize), because they participate in the distribution of valued resources. Workers can use that power to work with families rather than use power over them.

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For more information about the FDC, including information about where FDC training programs are being offered, contact Amy Knight, FDC Program Manager at (860) 486-0606 or by e-mail at [NationalFDC@UConn.edu](mailto:NationalFDC@UConn.edu).

[https://www.smdailyjournal.com/news/local/san-mateo-county-child-care-industry-recovering/article\\_2581e272-87fc-11ec-bf0a-cb077d885b83.html](https://www.smdailyjournal.com/news/local/san-mateo-county-child-care-industry-recovering/article_2581e272-87fc-11ec-bf0a-cb077d885b83.html)

# THE DAILY JOURNAL

The Peninsula's home page

## San Mateo County child care industry recovering

- By Sierra Lopez Daily Journal staff
- February 7, 2022

Two years into the pandemic, San Mateo County's child care system is still trying to recover from dips in enrollment but surging costs of operations, leaving leaders in the field to highlight necessary long-term solutions that will allow the vital industry to continue operating.



Kevin Mullin

“Prior to the pandemic access to quality child care was already a persistent challenge but the impact of COVID protocols and the shutting down of facilities has illuminated the importance of this sector and the lives of so many of our residents,” Assembly Speaker pro Tem Kevin Mullin, D-South San Francisco, said during a panel discussion Wednesday, Feb. 2.

[https://www.smdailyjournal.com/news/local/san-mateo-county-child-care-industry-recovering/article\\_2581e272-87fc-11ec-bf0a-cb077d885b83.html](https://www.smdailyjournal.com/news/local/san-mateo-county-child-care-industry-recovering/article_2581e272-87fc-11ec-bf0a-cb077d885b83.html)

Mullin was joined by a handful of industry leaders to discuss how the pandemic has exacerbated hurdles within the child care industry, including insufficient employee wages and unstable revenue streams.

Kitty Lopez, the co-chair of Build Up San Mateo County and executive director of First 5 San Mateo County, said industry leaders and local officials had been meeting weekly for 18 months to discuss the state of child care in the county, a \$12 million industry serving about 40,000 children daily, noted Sarah Kinahan, a coordinator with the Child Care Partnership Council.

“Despite its size and essential nature, our child care system was fragile even before COVID hit with providers operating on razor-thin margins,” Kinahan said.

At the start of the pandemic, about 45% of operators said they had a month or less of cash on hand, Kinahan said. And about half of the child care programs operating in the county closed, mostly occurring among family child care home and smaller centers, she added.

Enrollment numbers have since improved to about 61% of pre-pandemic figures, Kinahan said. And providers have received some support from millions in state and federal dollars but Kinahan said hundreds of millions more in funding is needed to ensure all families who need child care have fair and equitable access.

David Fleishman, executive director of 4C’s Child Care Coordinating Council of San Mateo County, noted women of color were the greatest hit by the pandemic, most often being the ones expected to relocate often without the capacity to absorb debts or to take time off.

[https://www.smdailyjournal.com/news/local/san-mateo-county-child-care-industry-recovering/article\\_2581e272-87fc-11ec-bf0a-cb077d885b83.html](https://www.smdailyjournal.com/news/local/san-mateo-county-child-care-industry-recovering/article_2581e272-87fc-11ec-bf0a-cb077d885b83.html)

“The pandemic has exacerbated the vulnerabilities of the field and has also brought to light many of the equity issues that were here in the field,” Fleishman said.

As the state moves to implement universal transitional kindergarten in schools, providers will likely face additional hurdles as parents decide into which programs to place their 4-year-olds, said Christopher Maricle, executive director of Head Start California.

Four-year-olds, who constitute about 40% of the children enrolled in Head Start programs, are less expensive to care for due to state children-to-adult ratios, meaning some providers will have to decide whether expanding their slots to children under 2 is financially feasible.

With the local industry short about 20,000 slots, according to a five-year-old assessment of the industry Kinahan cited, more options will greatly benefit families but Maricle said getting a universal program portal online will even the playing field for providers who lack the strength school districts and larger providers have to advertise their programs.

The speakers expressed hope some relief will come to the region through the federal Build Back Better bill though the future of that legislation is unknown. And the county still has millions of federal American Rescue Plan dollars to distribute.

Mullin noted additional state legislation is in the works, such as changes to child care licensing, that could alleviate some of the strain. And state funding is also being directed to the industry but Maricle noted the funding model for child care will need to see far greater revisions if the industry is to remain accessible to all while paying fair and competitive wages.

[https://www.smdailyjournal.com/news/local/san-mateo-county-child-care-industry-recovering/article\\_2581e272-87fc-11ec-bf0a-cb077d885b83.html](https://www.smdailyjournal.com/news/local/san-mateo-county-child-care-industry-recovering/article_2581e272-87fc-11ec-bf0a-cb077d885b83.html)

“We can not keep going back to the governor for a larger piece of the same pie,” Maricle said.

Ultimately, Michelle Blakely, deputy director of First 5 San Mateo County, said a shift in public will is necessary to solidify consistent revenue streams for the industry, noting consistent federal and local support is critical for keeping the industry running equitably.

She also argued that the economy’s recovery depends greatly on getting women back to work, noting they are often the primary caregivers for the young and old.

“It’s key to our economy to get women working especially when ... half of the working folks in this county are women,” Blakely said. “We need funding steams to support of children and families and so we need to have a strong labor force to do that.”

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FIRST 5 CENTER FOR  
CHILDREN'S POLICY



## Continuous Coverage for the First Years of Life

Consistent access to health care helps California's young children grow up safe, healthy, and ready to succeed in school and life. The first years in a person's life present a unique opportunity to set them up for healthy outcomes. Ninety percent of brain development occurs during the first five years, a time when the American Academy of Pediatrics recommends children receive 14 well-child visits to administer critical preventive care like immunizations and track developmental milestones.<sup>1 2</sup> However, gaps in coverage disrupt young children's care and can lead to children missing vital well-child visits and the chance to catch developmental concerns early.

Cycling on and off health insurance coverage—or churning—is disruptive to continuity of health care, and is especially problematic for young children.<sup>3</sup> Studies have shown that children who are uninsured for even short periods have reduced access to care and report more unmet health care needs than those with continuous coverage.<sup>4</sup> In addition, churn disrupts a family's relationship with a pediatric health care home, an important source of consistent support particularly before children enter school. The COVID pandemic has disrupted families' use of well-child visits, creating a dire situation for vulnerable children. The State should act to reverse the lack of access to preventive health care services among vulnerable young children, which has been exacerbated by the public health emergency, by extending continuous eligibility for the first five years of life.

**Medi-Cal's Already Low Rates of Children's Preventive Care.** A 2018 audit of Medi-Cal children's primary care showed preventive care utilization for 1-year olds was as low as 39% and for 2-year olds, a dismal 24%.<sup>5</sup> A more recent DHCS preventive care report found only 25% of children under age 3 in Medi-Cal managed care received necessary developmental screenings and only 26% received all their recommended well-child visits in the first 15 months of life.<sup>6</sup>

Reducing churn would improve Medi-Cal health plans' ability to provide all of the preventive services children are entitled to under federal law. Health plans with continuously enrolled children are better able to ensure they receive preventive care and meet quality metrics. Churn also increases unnecessary administrative costs for providers, health navigators, and counties (such as the costs associated with new presumptive eligibility screens, preparing new applications, and determining eligibility), as well as health care costs as people cycle back onto coverage after a gap.<sup>7</sup>

**Pediatric Care During the Pandemic Has Not Rebounded.** During the current COVID pandemic, primary care dropped significantly and pediatric care in particular has not yet returned to pre-pandemic utilization levels.<sup>8</sup> Vaccinations dropped off by 40 percent in April and are just now starting to stabilize.<sup>9</sup> That means far fewer children received their necessary well-child visits, and

<sup>1</sup> <https://brightfutures.aap.org/families/Pages/Well-Child-Visits.aspx>

<sup>2</sup> <https://developingchild.harvard.edu>

<sup>3</sup> <https://www.communitycatalyst.org/resources/publications/churn-toolkit>

<sup>4</sup> [https://www.academicpedsjnl.net/article/S1876-2859\(15\)00061-3/pdf](https://www.academicpedsjnl.net/article/S1876-2859(15)00061-3/pdf)

<sup>5</sup> California State Auditor, 2018-111 "Millions of Children in Medi-Cal are Not Receiving Preventive Health Services."

<sup>6</sup> Medi-Cal Preventive Care Utilization Report, DHCS 2020.

<sup>7</sup> <https://www.jstor.org/stable/pdf/resrep25608.pdf>

<sup>8</sup> Commonwealth Fund, 2020.

<sup>9</sup> <https://www.cms.gov/newsroom/press-releases/cms-issues-urgent-call-action-following-dramatic-decline-care-children-medicaid-and-childrens-health>



it will take time for children to catch up on vaccinations and screenings missed over the last year. Children who experience gaps in their health coverage will fall even further behind.

**Continuous Coverage is the Foundation of Continuity of Care.** Gaps in coverage, particularly in a child's early years, contribute to the historic and pandemic-related low rates of primary care for children. Conversely, ensuring continuous coverage—allowing children to keep their coverage without administrative hurdles—can significantly contribute to improving continuity of care for young children. Continuous coverage reduces the risk of insurance disruptions due to procedural reasons like difficulties completing renewal processes and providing necessary documentation to stay enrolled.<sup>10</sup> California adopted the federal option to provide 12-months of continuous eligibility in Medicaid for children in 2000,<sup>11</sup> which includes infants for their first year of life and then annual renewals up to age 18. Recent research finds that 12-month continuous coverage for children reduces the share of children experiencing gaps in coverage,<sup>12</sup> increases those accessing preventive care, and reduces the share with unmet medical needs.<sup>13</sup>

Despite the 12-month continuous coverage protections available to Medi-Cal children in California, young children are still experiencing lapses in coverage early in their life, which is particularly disruptive given the level of engagement families should be having with their child's health care home. DHCS data on enrollment shows that about 10 percent of children from birth to age 5 have had a gap in their Medi-Cal coverage in 2019.<sup>14</sup> That amounts to about 100,000 young Medi-Cal children having a disruption of their coverage.

## Opportunity—Budget Proposal

**Provide Multi-Year Continuity of Coverage for Young Medi-Cal Children.** Under the current national public health emergency (PHE), all Medi-Cal enrollees have temporary continuous enrollment. California will take a year to “unwind” this temporary continuous coverage when the PHE ends, sometime after December 2021. In budget year 2021-2022, California should provide multi-year continuous coverage for children until their fifth birthday. Under this proposal, young children (ages 0-5) who are enrolled in Medi-Cal as well as those newly applying before age 5 would have continuous Medi-Cal coverage until their 5<sup>th</sup> birthday. Continuous coverage for young children will help California effectively respond to Medi-Cal's historically very low preventive care rates for children. This action is more important now than ever given evidence that the pandemic has drastically reduced pediatric health care utilization even further.<sup>15 16 17</sup>

<sup>10</sup><https://www.cbpp.org/research/health/continuous-coverage-protections-in-families-first-act-prevent-coverage-gaps-by>

<sup>11</sup><https://www.chcf.org/wp-content/uploads/2017/12/PDF-ChildrensHealthCoverage2012.pdf>

<sup>12</sup><https://www.macpac.gov/wp-content/uploads/2021/10/An-Updated-Look-at-Rates-of-Churn-and-Continuous-Coverage-in-Medicaid-and-CHIP.pdf>

<sup>13</sup><https://www.cbpp.org/research/health/continuous-coverage-protections-in-families-first-act-prevent-coverage-gaps-by>

<sup>14</sup><https://www.dhcs.ca.gov/dataandstats/Documents/Medi-Cal-Enrollment-Data-June-2021.pdf>

<sup>15</sup><https://www.cdph.ca.gov/Programs/OPA/Pages/NR20-090.aspx#YourActionsSavesLives>

<sup>16</sup><https://www.commonwealthfund.org/publications/2020/oct/impact-covid-19-pandemic-outpatient-care-visits-return-prepandemic-levels>

<sup>17</sup><https://medium.com/rapid-ec-project/health-still-interrupted-pandemic-continues-to-disrupt-young-childrens-healthcare-visits-e252126b76b8>

# 2022 POLICY AGENDA

## FOR THE WHOLE CHILD AND FAMILY



First 5 Association of California (First 5) believes that all of California's youngest children deserve to be healthy, safe, and ready to succeed in school and life. Grounded in a whole child / whole family framework that advances equity, prevention strategies and systems coordination, First 5 seeks to build comprehensive and integrated early childhood systems of care, with an intentional focus on prenatal to age 3 as a critical stage of child development.

First 5 focuses on systems change, particularly across sectors, with an intention to shift the conditions that hold problems in place, to achieve meaningful and lasting social change.

First 5 aims to advance state and federal policy frameworks that foster systems of care that proactively support the wellbeing of young children and families; systems that reach those farthest from opportunity, recognizing the disproportionate impacts that systemic racism, COVID-19, lack of economic opportunity, and natural disasters have had, and continue to have, on communities of color and low-income communities. These include:

### Policy Priorities



#### Infant & Early Childhood Mental Health (IECMH)

Mental health supports for young children and their families are vitally important to promoting resilience and social-emotional health and addressing the unique needs of infants and young children experiencing toxic stress and ACEs.



#### Resilient Families

Family-strengthening programs, like home visiting, improve birth outcomes, promote resilience and reduce parental stress, teach positive parenting techniques, and nurture stable, healthy, loving attachments for infants and their caregivers.



#### Comprehensive Health & Development

High-quality and accessible developmental and health screenings, and timely connection to early intervention services when needed, improve life-long outcomes for children. Family-centered healthcare services that prioritize prevention are fundamental for young children's healthy development.



#### Quality Early Learning

High-quality early childhood care and education facilitates social-emotional learning and helps young children build critical early literacy and math skills, setting them on the path for school readiness and long-term academic success.

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## INFANT AND EARLY CHILDHOOD MENTAL HEALTH (IECMH)

- » Increase access to community-based IECMH programs that are prevention-focused, help mitigate trauma, promote resilience, and identify concerns early.
  - » Secure increased investments in the workforce to create a robust network of providers trained in IECMH.
  - » Support investments in the implementation of the new dyadic care Medi-Cal benefit, including technical assistance for local community partners, peer navigators, pediatric health care providers and others.
- 

## RESILIENT FAMILIES

- » Build and expand upon state and local systems that provide family strengthening services rooted in the cultural and linguistic diversity of communities, such as home visiting.
  - » Expand and strengthen the home visiting workforce through additional professional development resources, in coordination with local early childhood systems building efforts, with the goal of ensuring home visitors represent the diversity of California's families.
  - » Increase cross-system coordination to ensure families are offered the most relevant and effective services available in a timely manner.
  - » Increase family economic supports, so that families can provide stable, thriving homes in which to raise children.
- 

## COMPREHENSIVE HEALTH AND DEVELOPMENT

- » Improve the physical health, mental health, and overall wellbeing of young children by advancing prevention services, care coordination, screenings, and multi-generational supports through Medi-Cal, including continuous Medi-Cal enrollment for children ages 0 to 5.
  - » Strengthen the systems of early identification and referral to appropriate intervention services for young children.
  - » Reduce racial inequities in maternal and infant health outcomes, including through removing systemic barriers to care for people of color, eliminating systemic racist practices, and increasing culturally relevant services for birthing people.
- 

## QUALITY EARLY LEARNING

- » Stabilize, strengthen, and scale early care and learning opportunities, with a focus on infant and toddler care.
  - » Promote increased access and affordability across the mixed delivery system, workforce support, system strengthening, and equitable access to quality improvement support to promote nurturing relationships between provider/caregivers and child.
-

REPORT FOR JAN 1, 2022 - JAN 31, 2022

# FIRST 5 SAN MATEO ANALYTICS

## OVERVIEW

### OVERVIEW - JANUARY

This month's F5SMC Communications focused on sharing the SVCF Family Story Project Video content. First 5 San Mateo County content highlighted and promoted videos of parents sharing their stories, their coping mechanisms, and their dreams for the future.

#### Website

Web traffic increased month over month and year over year in January. 79% of the visitors to the site were new to the site. The majority of site visits were referred by Facebook, both the desktop and mobile platforms, but about one-third of the references came from the 4Cs website. Pages per session, average duration, and bounce rate all showed improvement year over year and month over month.

#### Social Media

- At the end of January, the First 5 SMC Facebook page had 1,600 total fans, up from 1594 at the end of December. January page impressions increased by about 30,000, generated through video views. The engagement rate was 24.20%, which is significantly higher than last month. The top post was Dr. Sanjay's ACEs Awareness story, both in English and with Spanish subtitles and captions.
- Instagram followers increased by 21 to 1235 in January. The top post was a celebration of Martin Luther King Day. The engagement rate of the top post was about 10% and the overall average engagement rate was about 6%, an increase in year-over-year performance from last January.
- Twitter followers increased by 1 to 666. Impressions and engagement both increased in year-over-year performance. There were 8 follower retweets.
- LinkedIn increased by 3 followers to 115. Engagement was 7.0%. The highest performing post was a celebration of Martin Luther King Jr. Day.

#### Email Marketing

- The newsletter that went out in January was a letter about 2021 in review from Kitty. It had an open rate of 33.6%, which is consistent with First 5 SMC's previous campaigns and about 15% higher than the industry average.

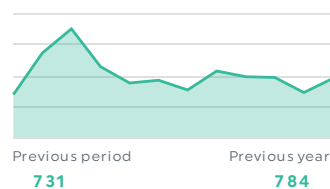
## WEBSITE ANALYTICS

### TOP PAGES BY PAGEVIEWS

Page Path	Pageviews
/	457
/covid-19-information-resources/	141
/adverse-childhood-experiences/	69
/staff/	63
/about/	60
/kit-for-new-parents/	60
/parents-ask-your-doctors-for-aces-screenings/	59
/resources/	58
/commission/	48
/for-parents-families/	44
/who-we-are/	39
/our-impact/	38
/commissioners/	37
/category/covid-19-2/	30
/family-story-project/	29
/early-childhood-development/	28
<b>Total</b>	<b>2,022</b>

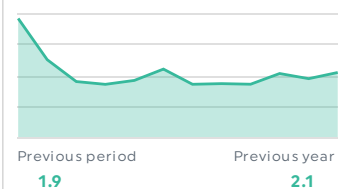
### TOTAL SESSIONS

959

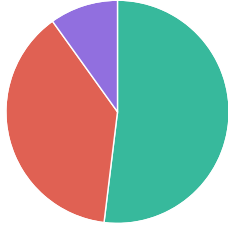


### PAGES PER SESSION

2.1



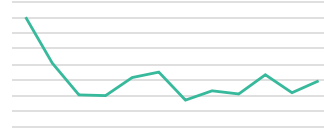
## TOP SOURCES BY SESSIONS



Medium	Sessions	Previous period
organic	498	318
(none)	366	313
referral	95	100
<b>Total</b>	<b>959</b>	

## AVERAGE SESSION DURATION

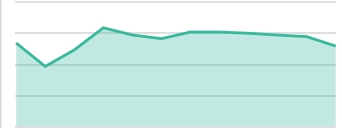
00:01:28



Previous period: 00:01:05 | Previous year: 00:01:20

## BOUNCE RATE

64.75%

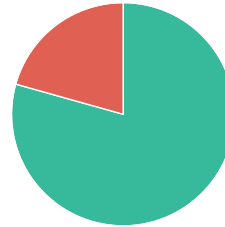


Previous period: 72.37% | Previous year: 70.66%

## TOP REFERRERS BY SESSIONS

Source	Sessions	Previous period
l.facebook.com	19	11
m.facebook.com	19	19
sanmateo4cs.org	19	5
facebook.com	7	18
first5association.org	4	N/A
buildupsmc.com	3	N/A
cosmobrاند.ru	3	8
helpmegrowsmc.org	3	8
t.co	3	3

## NEW VS RETURNING

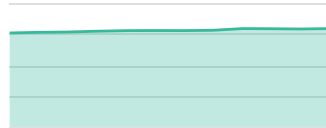


Visitor Type	Sessions
New Visitor	79.4%
Returning Visitor	20.6%

## FACEBOOK INSIGHTS

### FANS COUNT

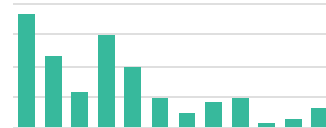
1,600



Previous period: 1,594 | Previous year: 1,513

### FAN ADDS

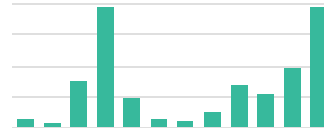
4



Previous period: 2 | Previous year: 13

### PAGE IMPRESSIONS

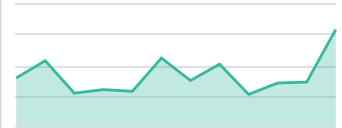
58,753



Previous period: 29,053 | Previous year: 9,340





### PAGE ENGAGEMENT RATE

6.34%







Previous period: 2.95% | Previous year: 2.36%

TOP POSTS BY ENGAGEMENT RATE

Post With Image	Engagement Rate	Total Reactions	Post Comments	Post Shares
 Tu familia. Tu salud. Tu historia. Los exámenes de detección de ACE le brindan información sobre su salud. Pídale a su médico un examen de detección de ACE hoy mismo y visite ACE Aware para	24.20%	1	0	0
 Your family. Your health. Your story. ACEs screenings give you information about your health. Ask your doctor for an ACEs screening today & visit ACEs Aware for more information.	13.16%	3	0	0
 Tu familia. Tu salud. Tu historia. Los exámenes de detección de ACE le brindan información sobre su salud. Pídale a su médico un examen de detección de ACE hoy mismo y visite ACEs Aware	12.33%	5	0	0
 READ BELOW: Our very own Executive Director, Kitty Lopez: "We commend Governor Newsom for continuing to invest in California's youngest children in this year's proposed budget. The	12.20%	5	0	0

TOP POSTS BY IMPRESSIONS

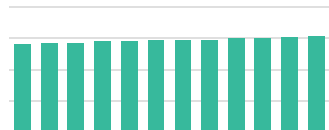
1

Post With Image	Post Impressions	Post Reach
 Your family. Your health. Your story. ACEs screenings give you information about your health. Ask your doctor for an ACEs screening today & visit ACEs Aware for more information. #YourStory #ACEsAware (id: 618117351594890_6716361091770455)	10,982	6,337
 Tu familia. Tu salud. Tu historia. Los exámenes de detección de ACE le brindan información sobre su salud. Pídale a su médico un examen de detección de ACE hoy mismo y visite ACE Aware para obtener más información. #TuHistoria #AC ... (id: 618117351594890_6716409895098908)	6,535	3,140
 The last 18 months or so have been incredibly unpredictable, but throughout San Mateo County, teachers and early care providers have been doing everything they can to keep your kids safe. The first 5 years are so important to your ... (id: 618117351594890_6728651910541373)	335	305
 Photos from County of San Mateo - Government's post (id: 618117351594890_6897955330277696)	146	143

INSTAGRAM INSIGHTS

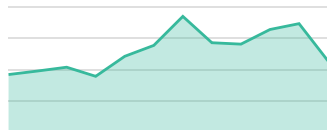
FOLLOWERS

1,235



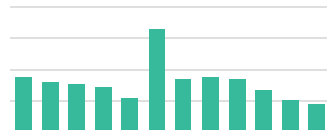
ENGAGEMENT RATE

5.66%



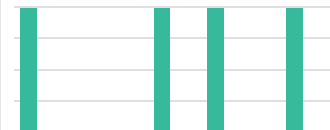
LIKES ON POSTS

44







COMMENTS ON POSTS





0



## TOP POSTS BY ENGAGEMENT RATE

Post With Image	Engagement Rate	Likes	Comments
 We are reflecting on this Martin Luther King Jr. Day. Martin Luther King Jr. illuminated what justice could and should look like in our country and communities, and started the roadmap to get there. Every day, we offer children and families support for their needs as we continue striving toward a more all encompassing justice.	9.80%	10	0
 LINK IN BIO! Join us for an uncommonly open and honest dialogue about taking off our masks and revealing our common needs for support, expression, recognition, meaning, and connection. By closing the gap between who we are on the inside and who we show up as at work, school, online or onsite, we can create more dynamic connections with	6.92%	9	0
 Happy New Year, San Mateo County!	9.41%	8	0
 The last 18 months or so have been incredibly unpredictable, but throughout San Mateo County, teachers and early care providers have been doing everything they can to keep your kids safe. The first 5 years are so important to your child's healthy brain development. Find a safe and fun way to send your child back to early care or preschool.	5.19%	8	0

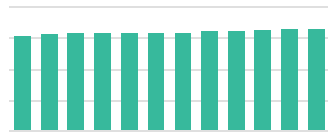
## TOP POSTS BY IMPRESSIONS

Post With Image	Impressions	Reach
 The last 18 months or so have been incredibly unpredictable, but throughout San Mateo County, teachers and early care providers have been doing everything they can to keep your kids safe. The first 5 years are so important to your child's healthy brain development. Find a safe and fun way to send your child back to early care or preschool.	154	140
 LINK IN BIO! Join us for an uncommonly open and honest dialogue about taking off our masks and revealing our common needs for support, expression, recognition, meaning, and connection. By closing the gap between who we are on the inside and who we show up as at work, school, online or onsite, we can create more dynamic connections with colleagues, families, and the community. In our Winter CAFE series, we will explore tools for	130	119
 Tu familia. Tu salud. Tu historia. Los exámenes de detección de ACEs le brindan información sobre su salud. Pídale a su médico un examen de detección de ACE hoy mismo y visite @acesaware para obtener más información. #TuHistoria #YourStory #ACEsAware	118	111
 We are reflecting on this Martin Luther King Jr. Day. Martin Luther King Jr. illuminated what justice could and should look like in our country and communities, and started the roadmap to get there. Every day, we offer children and families support for their needs as we continue striving toward a more all encompassing justice.	102	94

## TWITTER INSIGHTS

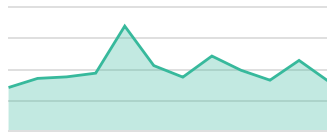
### FOLLOWERS

666



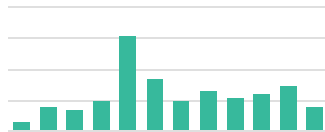
### FOLLOWER ENGAGEMENT RATE

4.05%



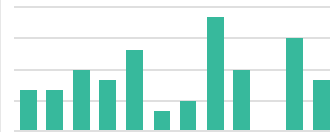
### RETWEETS OF ORIGINAL POSTS

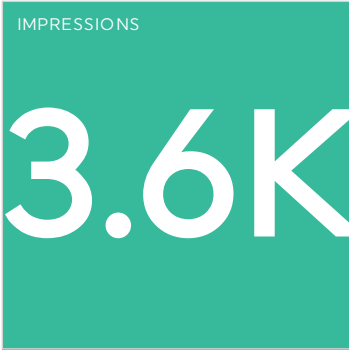
8



### MENTIONS

5



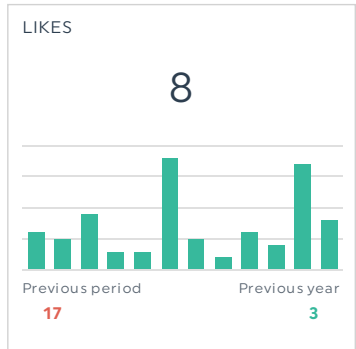
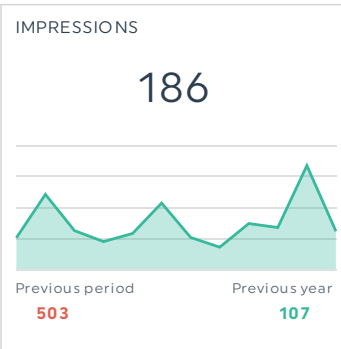
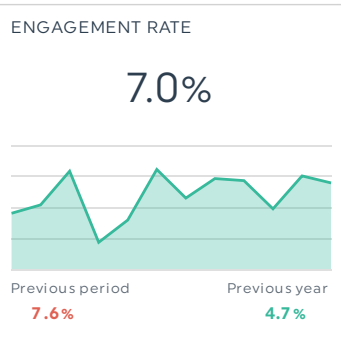
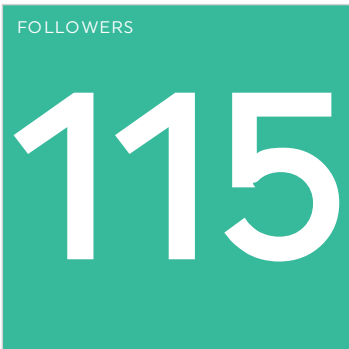


TOP RETWEETED POSTS






Post ^

- Adverse Childhood Experiences (ACEs) play a huge role in your child's health. These medical provi... **1**
- By closing the gap between who we are on the inside and who we show up as at work, school, onli... **1**
- Thank you to @AsmGrayson for authoring and introducing today a resolution recognizing this Ja... **4**
- Your family. Your health. Your story. ACEs screenings give you information about your health. As... **2**

LINKEDIN INSIGHTS



TOP POSTS BY ENGAGEMENT RATE (WITH IMAGE)

Post with image	Engagement Rate	Likes	Clicks
 <p>We are reflecting on this Martin Luther King Jr. Day. Martin Luther King Jr. illuminated what justice could and should look like in our country and communities, and started the roadmap to get there. Every day, we offer children and families support for their needs as we continue</p>	15.4%	0	2
 <p>Adverse Childhood Experiences (ACEs) play a huge role in your child's health. These medical providers all screen for ACEs. Ask your family's doctor if they do too! <a href="https://bit.ly/3zBs6b8">https://bit.ly/3zBs6b8</a></p>	14.3%	1	0
 <p>Our future is bright because her future is bright. Glad to have Valeria aboard as our newest youth commissioner. <a href="https://bit.ly/3zzxQT3">https://bit.ly/3zzxQT3</a></p>	13.3%	1	1
 <p>The last 18 months or so have been incredibly unpredictable, but throughout San Mateo County, teachers and early care providers have been doing everything they can to keep your kids safe. The first 5 years are so important to your child's healthy brain development. Find a</p>	7.1%	0	0
 <p>Your family. Your health. Your story. ACEs screenings give you information about your health. Ask your doctor for an ACEs screening today &amp; visit ACEs Aware for more information. #YourStory #ACEsAware <a href="https://lnkd.in/ebJv7q6">https://lnkd.in/ebJv7q6</a></p>	0.0%	0	0



OPEN RATE

Campaign Name	Open Rate ▾		Opens		Sends		Clicks		Click Rate	
January Newsletter Year End Letter- First 5 SMC	33.60%	+33.60%	122	+122	394	+394	14	+14	0.04%	+0.04%
First 5 SMC Commission Meeting Notification 1/24/2022	31.90%	+31.90%	109	+109	374	+374	16	+16	0.05%	+0.05%

NOTES

1. Impressions are the number of times your content is displayed. Reach is the total number of people who see your content.



**DATE:** February 28, 2022  
**TO:** First 5 San Mateo County Commission  
**FROM:** Kitty Lopez, Executive Director  
**RE:** Presentation: F5SMC Integrated System for Children with Special Needs Initiative Update

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**ACTION REQUESTED**

No action requested. For discussion only.

**BACKGROUND**

Early identification and treatment of special needs during the first five years of life is critical because this is the time when a child's brain, body, and behavior are most malleable. Early detection is critical for the 17 percent of all children in the U.S. who the CDC estimates experience developmental or behavioral problems. Although the American Academy of Pediatrics recommends that pediatricians implement universal screening for their patients three times before a child's third birthday, only 21% of children in California receive timely developmental screenings through their medical home. Early data in San Mateo County mirror the statewide data. On an annual basis, roughly 4,000 children under age six miss out on critical early intervention services for which they may qualify.

In July 2020 with combined funding from Sequoia Healthcare District, The David and Lucile Packard Foundation, and Peninsula Healthcare District, First 5 SMC launched the most recent iteration of our Integrated System for Children with Special Needs Initiative. This effort intends to bolster the continuum of care to identify & treat children with special needs and address systemic issues that impact accessibility & quality of these services. This includes promoting universal social-emotional and developmental screening for children 0-5; embedding screenings, assessments, & care coordination into pediatric clinics, early learning settings, or family support services; and supporting linkages & timely access to care coordination, assessment, & services for children/families requiring assistance.

With this vision in mind, F5SMC issued a collaborative procurement process to recontract all services and strategies for the Integrated Systems for Children with Special Needs. This process resulted in a lead agency contract to AbilityPath with smaller subcontracts to 6 others: LifeSteps Foundation, Legal Aid Society of SMC, Silicon Valley Community Foundation, Stanford Children's Health Developmental Behavioral Pediatrics Unit, Stanford Children's Health Government and Community Relations Department, and StarVista. The contracts allow for a streamlined continuum of care and greater coordination between the components of the initiative, which includes a fully actualized Help Me Grow (HMG) model, more parent-child offerings to support development and mental health concerns, legal supports for providers and parents who encounter particularly persistent barriers to access, a robust multidisciplinary roundtable to troubleshoot complex cases, and a focus on systems alignment between health and early learning sectors.

Carol Elliott, Director of Family Support Services at AbilityPath and the administrative lead for the F5SMC Integrated Systems for Children with Special Needs grant, and F5SMC Strategic Initiatives Project Manager, Emily Roberts, will co-present on the progress during the first year of this grant (FY 2020-21) at today's Commission meeting. F5SMC wishes to thank our grant-funded partners and consultants, as well as our community partners for your tireless efforts on behalf of children with special needs and their families.

**ACTION REQUESTED**

No action requested. For discussion only.

**DATE:** February 28, 2022  
**TO:** First 5 San Mateo County (F5SMC) Commission  
**FROM:** Kitty Lopez, Executive Director  
**RE:** Committee Updates

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**Program, Operations and Planning (POP) Committee Meeting – February 7, 2022**

- Commission Members: Ken Cole, Nancy Magee, Nkia Richardson  
Harvey Kaplan (Public Member)
- Public Attendee: Liz Scully
- Staff: Kitty Lopez, Michelle Blakely, Myra Cruz

**1. Adopt a resolution finding that, because of the continuing COVID-19 pandemic state of emergency, meeting in person would present imminent risks to the health or safety of attendees**

MOTION: Commissioner Magee / SECOND: Commissioner Richardson  
Motion approved.

**2. Elect Committee Chair**

Commissioner Magee nominated Commissioner Cole for POP Committee Chair. Public Member Kaplan motioned to approve Commissioner Cole’s nomination. Seconded by Commissioner Richardson. Motion approved.

**3. Review Mini Parent Story Project Report: Conversations with Families Raising Young Children in San Mateo County during the COVID-19 Pandemic**

Michelle Blakely, Deputy Director of First 5 San Mateo County (F5SMC), shared that the Internal Family Story Project – Conversations with Families Raising Young Children in San Mateo County During COVID-19 Report was developed in partnership with Silicon Valley Community Foundation. A full video was presented at the January 24, 2022 F5SMC Commission Meeting, and a one-pager will be developed as an advocacy tool and presented to the Commission in February 2022. The written report includes family stories, quotes, and reflections during the pandemic as well as recommendations based on these conversations. Families experienced parenting challenges, language barriers, financial insecurities, and fear & isolation. Blakely highlighted the following recommendations for:

- Increase level of investment to align available support systems locally.
- Advocate for families who are disenfranchised at all levels.

The Committee shared their reflections on these recommendations.  
Discussion ensued.

**4. F5SMC’s SMC Equity Performance Action Plan 2022**

Michelle Blakely shared that the County Office requested that all County departments create an action plan to identify and implement equity performance measures. Kitty Lopez, F5SMC’s Executive Director, added that she and Michelle sit on SMC’s Sub-Committee

Internal Core Equity Team and Community Engagement Teams. Blakely highlighted the F5SMC's Action Plan:

- Intentionally target investments and systems improvement efforts toward populations of children and families that may experience challenges related to inequitable access to resources, systemic oppression, or situations within their families that can compromise child development
- Track the number of clients across race/ethnicity who receive F5SMC-funded services. (Disaggregated)
- Track the zip code of clients served who are funded by F5SMC (Disaggregated)
- Learn about the equity-related characteristics of funded organizations (Disaggregated)
- Implement Racial Equity, Human Centered Design (101) and Trauma & Resiliency Coaching and Consultation for F5 Staff and Commissioners to support F5's work internally and externally.

The Committee shared their reflections on these Action Plans. Discussion ensued. A presentation to the full Commission on Equity Performance Action plan is scheduled for the March 28, 2022 Commission meeting.

#### 5. Programs & Systems Updates:

- **Communications Consultation Services**  
A communications budget amendment will be presented for VIVA Social Impact Partners, communications consultant, for FY 22 – 23 in upcoming Commission meeting.
- **Strategic Plan Implementation FY 23 – 25**  
The Phase 1 (2020 – 2023) of Strategic Plan funding will sunset in June 2023. We will share our recommendations by December and January 2023 for the Phase 2 (2024 – 2025) of Strategic Plan Implementation funding. Staff will develop a resource allocation approach for consideration. The landscape for service delivery, systems enhancements and policies affecting children and families is changing because of COVID and new state and federal funding streams and priorities; we will be looking for the best strategies for F5SMC funding.
- **Grantee Presentations**  
Stay tuned for grantees and staff presentations to the Commission on projects and initiatives.

#### 6. Other:

The Committee greeted Public Member Kaplan on his 84<sup>th</sup> birthday.

The meeting adjourned at 5:00 pm

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#### Finance and Administration Committee Meeting – February 14, 2022

- Commissioners: Alexis Becerra, Rosanne Foust, Sylvia Espinoza (absent)
- Staff: Kitty Lopez, Khanh Chau

**1. Adopt a resolution finding that, because of the continuing COVID-19 pandemic state of emergency, meeting in person would present imminent risks to the health or safety of attendees**

MOTION: Commissioner Foust / SECOND: Commissioner Becerra  
Motion approved.

**2. Election of Finance and Administration Committee Chair**

Committee members endorsed and voted Commissioner Becerra to serve as Finance and Administration Committee Chair for FY 2022.

**3. Review Budget Monitoring Report as of December 31, 2021**

Kitty Lopez briefly presented an overview of the Budget Monitoring Report as of December 31, 2021 comparing to 50% YTD Benchmark (Attachments 11A, 11B, 11C, 11D). YTD Total Revenue is 16% higher than YTD benchmark due to the inclusion of fiscal year Prop 56 Tax revenue, Children's Health Initiative (CHI) refund and new grant awards.

Total Appropriations is 8% below YTD Benchmark due to pending planning and implementation of the SPIP FY18-20 in coordination within 3-year time frame of the new strategic plan SPIP FY20-23.

Projected Ending Fund balance of 10.775 million or 132%, that represents a positive variance of 32% or \$2.617 million higher than the planned budget.

Committee members reviewed the Budget Monitoring Report as of December 31, 2021 and had no further questions.

**4. Review and Recommend Approval of F5SMC's FY2021-22 Revised Budget and the Use of Ending Fund Balance (Ending Reserves\*) to Fund F5SMC's FY2021-22 Revised Budget**

Kitty Lopez briefly stated that we always have the agency Revised Budget in February to honor grant executions and contract obligations, after last year financial audit completed and FY21-22 contract budgets become available. As per our Strategic Plan, Commission has approved higher Community Investments by drawing funds from Reserves for fund agency Revised Budget.

Kitty Lopez provided key budget changes in the F5SMC's FY2021-22 Revised Budget, as presented in the summary table of the Budget memo: Beginning Fund Balance is adjusted an increase of \$3.015 M as per the audited Ending Fund Balance as of 6.30.2021; Total Revenues increase by \$444K, Total Appropriations increase by \$400K; the FY2020-21 Revised Budget changes results in a budget deficit of \$1.717 M or \$46K higher than the budget deficit of the initial Adopted Budget FY2021-22; Administrative Cost Rate is 10%, which is below the approved Admin Cost Rate for FY2021-22.

Committee members reviewed the F5SMC's FY2021-22 Revised Budget and commented that the Budget memo and Budget Narratives provide helpful information that are easy to read and follow through. Committee members felt comfortable with the clarity of Budget Changes presented in the Fiscal Impacts of the Budget memo and had no further questions. Committee members suggested changes of the order of the bullets under the Budget Assumptions by moving bullets 5,6,7 before bullets 1,2,3 for clarity improvement.

Committee members endorsed and recommended the Approval of F5SMC's FY2021-22 Revised Budget and the Use of Ending Fund Balance (Ending Reserves\*) to Fund F5SMC's FY2021-22 Revised Budget.

Next Finance and Administration Committee Meeting will be on May 9, 2022

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**DATE:** February 28, 2022  
**TO:** First 5 San Mateo County Commission  
**FROM:** Kitty Lopez, Executive Director  
**RE:** Budget Monitoring Report as of December 31, 2021

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**BUDGET MONITORING REPORT as of December 31, 2021 HIGHLIGHTS**

**Budget Monitoring Report as of December 31, 2021 Highlights**

The Budget Monitoring Report as of December 31, 2021 is presented in **Attachments 11B, 11C, and 11D**. Key Budget Monitoring Report highlights are as following:

**YTD Benchmark: 50%**

**REVENUES**

- YTD Interest Revenue projection is \$55K or 58%, that represents a positive variance or 8% higher than YTD Benchmark.
- YTD Tobacco Tax Revenue projections are \$3.536 million or 69%, that represents a positive variance or 19% higher than YTD Benchmark due to the disbursement of Prop 56 Tax revenue.
- YTD Other Grant Revenue is \$694K or 66%, which is 16% higher than YTD Benchmark due to the receipt of CHI refund and new grant awards.
- YTD Total Revenues projections are \$4.286 million or 68%, that represents a positive variance or 18% higher than YTD Benchmark. Major attributable factors to this positive variance are associated with the disbursement of Prop 56 Tax revenue, Children's Health Initiative (CHI) refund and new grant awards.

**APPROPRIATIONS**

- YTD Program Expenditures projections are \$2.986 million or 42%, that represents a positive variance or 8% below YTD Benchmark. Major contributions to this positive variance are attributable to pending planning and implementation of Strategic Plan Implementation Plan (SPIP) FY18-20 in coordination within 3-year time frame of the new strategic plan SPIP FY20-23.
- YTD Admin Expenditures projections of \$354K or 44% that represents a positive variance or 6% below YTD Benchmark. Major contributions to this positive variance are attributable to savings in various Office Supplies and Business Travel Expenses associated with staff working outside the office.
- **YTD Total Appropriations (Net Appropriations\*)** projections are \$3.340 million or 42%, that represents a positive variance or 8% below YTD Benchmark. Major contributions to this positive variance are attributable to pending planning and implementation of the SPIP FY18-20 in coordination within 3-year time frame of the new strategic plan SPIP FY20-23.

**ENDING FUND BALANCE (RESERVES\*)**

- Currently, we are projecting Ending Fund balance (Reserves\*) of \$10.775 million or 132%, that represents a positive variance of 32% or \$2.617 million higher than the planned budget.

Major contributions to this positive variance are attributable to the disbursement of Prop 56 Tax revenue, the CHI refund and pending planning and implementation of SPIP FY18-20 within 3-year time frame of the new strategic plan SPIP FY20-23.

**CHALLENGES: None at this time.**



**GLOSSARY**

Prop 56 Revenue Backfills. The Proposition 56 taxes reduce tax-paid tobacco purchases (hereafter, “consumption”), resulting in lower revenue for other tobacco tax funds. In the first revenue allocation step, some Proposition 56 revenues replace—or “backfill”—these revenue losses.

<https://lao.ca.gov/Publications/Report/3939>

## FIRST 5 SAN MATEO COUNTY

## SUMMARY BUDGET MONITORING REPORT as of December 31, 2021

YTD Benchmark: 50%

	FY21-22 Adopted Budget	YTD Actuals as of December 31, 2021	Accruals	YTD Combined	YTD Combined vs. FY21- 22 Adopted Budget (%)
<b>BEGINNING FUND BALANCE (Beginning Reserves*)</b>	<b>9,829,030</b>	<b>9,829,030</b>		<b>9,829,030</b>	<b>100%</b>
<b>A. Interest Revenue</b>	<b>96,000</b>	<b>31,259</b>	<b>24,000</b>	<b>55,259</b>	<b>58%</b>
<b>B. Tobacco Tax Revenue</b>	<b>5,106,000</b>	<b>2,107,045</b>	<b>1,429,750</b>	<b>3,536,795</b>	<b>0%</b>
Tobacco Tax Revenue Fiscal Year Allocations	5,106,000	2,107,045	1,429,750	3,536,795	69%
<b>C. Other Grant Revenues</b>	<b>1,058,000</b>	<b>226,378</b>	<b>468,066</b>	<b>694,444</b>	<b>66%</b>
F5CA Other Grants / IMPACT Grant	502,000	46,047	100,000	146,047	37%
Non-Tobacco Tax Grants (DLP, PHD, SHD, MHSA)	556,000	8,580	368,066	376,646	68%
<b>TOTAL REVENUES</b>	<b>6,260,000</b>	<b>2,364,681</b>	<b>1,921,816</b>	<b>4,286,497</b>	<b>68%</b>
<b>TOTAL AVAILABLE FUND (Total Sources*)</b>	<b>16,089,030</b>	<b>12,193,712</b>	<b>1,921,816</b>	<b>14,115,528</b>	<b>88%</b>
<b>PROGRAM APPROPRIATIONS</b>					
<b>D1. Strategic Plan Investment - SPIP FY 20-23</b>	<b>3,780,000</b>	<b>795,263</b>	<b>945,000</b>	<b>1,740,263</b>	<b>46%</b>
Community Investments (FE, CH&D, EL)	3,180,000	665,561	795,000	1,460,561	46%
Policy, Advocacy, & Communications (PAC)	487,000	118,792	121,750	240,542	49%
Evaluation	113,000	10,911	28,250	39,161	35%
<b>D2. Strategic Plan Investment - SPIP FY 18-20 Carry-Over</b>	<b>1,120,000</b>	<b>26,825</b>	<b>280,000</b>	<b>306,825</b>	<b>27%</b>
Community Investments (FE, CH&D, EL)	400,000	21,815	38,000	38,000	10%
Evaluation	350,000	-	280,000	306,825	88%
Policy, Advocacy, & Communications (PAC)	370,000	5,010	100,000	121,815	33%
<b>E. Other Grants</b>	<b>954,000</b>	<b>164,214</b>	<b>238,500</b>	<b>402,714</b>	<b>42%</b>
F5CA Other Grants / IMPACT Grant	439,000	58,396	109,750	168,146	82%
Non-Tobacco Tax Grants (DLP, PHD, SHD, MHSA)	515,000	105,818	128,750	234,568	45%
<b>F. Program Operations</b>	<b>1,265,149</b>	<b>534,895</b>	<b>1,431</b>	<b>536,326</b>	<b>42%</b>
Program Shared Operating Budget	206,300	83,415	1,431	84,846	41%
Program Staff S&B & Shared Admin Staff Time	873,309	377,282	0	377,282	43%
Evaluation Staff S&B	185,540	74,198	0	74,198	40%
<b>Total Program Appropriations (D1+D2+D3+E+F)</b>	<b>7,119,149</b>	<b>1,521,197</b>	<b>1,464,931</b>	<b>2,986,129</b>	<b>42%</b>
<b>ADMIN APPROPRIATIONS</b>					
<b>G. Admin Shared Operating Budget</b>	<b>206,300</b>	<b>83,415</b>	<b>1,431</b>	<b>84,846</b>	<b>41%</b>
<b>H. Admin Staff S&amp;B</b>	<b>605,810</b>	<b>269,453</b>	<b>-</b>	<b>269,453</b>	<b>44%</b>
<b>Total Admin Appropriations (G+H)</b>	<b>812,110</b>	<b>352,868</b>	<b>1,431</b>	<b>354,299</b>	<b>44%</b>
<b>TOTAL APPROPRIATIONS (Net Appropriations*)</b>	<b>7,931,259</b>	<b>1,874,066</b>	<b>1,466,362</b>	<b>3,340,428</b>	<b>42%</b>
Surplus / (Deficit) (Total Revenues - Total Appropriations)	(1,671,259)	490,616	455,454	946,070	
<b>ENDING FUND BALANCE</b>	<b>8,157,771</b>	<b>10,319,646</b>	<b>455,454</b>	<b>10,775,100</b>	<b>132%</b>
<b>Total S&amp;B</b>	<b>1,664,659</b>	<b>720,933</b>	<b>-</b>	<b>720,933</b>	<b>43%</b>

## FIRST 5 SAN MATEO COUNTY

## DETAILS BUDGET MONITORING REPORT as of December 31, 2021

YTD Benchmark: 50%

	ORG/ACCT#	FY21-22 Adopted Budget	YTD Actuals as of December 31, 2021	Accruals	YTD Combined	YTD Combined vs. FY21-22 Adopted Budget (%)	Notes to Budget Monitoring Report
<b>BEGINNING FUND BALANCE (Beginning Reserves*)</b>		<b>9,829,030</b>	<b>9,829,030</b>		<b>9,829,030</b>	100%	
<b>A. Interest Revenue</b>	19510-1521	<b>96,000</b>	31,259	24,000	55,259	58%	\$24K is Q2 Interest Revenue estimate
<b>B. Tobacco Tax Revenue</b>		<b>5,106,000</b>	<b>2,107,045</b>	<b>1,429,750</b>	<b>3,536,795</b>		
Tobacco Tax Revenue Fiscal Year Allocations	19510-1861	<b>5,106,000</b>	2,107,045	1,429,750	3,536,795	69%	\$1.429 K are Prop 56 revenue accrual
<b>C. Other Grant Revenues</b>		<b>1,058,000</b>	<b>226,378</b>	<b>468,066</b>	<b>694,444</b>	<b>66%</b>	\$529K is Q1&Q2 Other Grant Revenue estimate
F5CA IMPACT Grant FY20-23	19510-1861	400,000	46,047	100,000	146,047	37%	\$100K is Q2 F5CA IMPACT Grant Revenue estimate
F5CA Home Visiting Grant FY20-22	19510-1861	102,000		51,000	51,000	50%	\$51K is Q1&Q2 F5CA Home Visiting Grant Revenue estimate
F5SF IMPACT HUB TA FY21-22	19510-2643			39,066	39,066		
Mental Health Services MHSA Prop 63	19510-2643	85,000		42,500	42,500	50%	\$42.5K is Q1&Q2 OMHSA Grant Revenue estimate
David Lucile Packard- Help Me Grow FY20-22	19510-2643	75,000		37,500	37,500	50%	\$37.5K is Q1&Q2 DLP Help Me Grow Grant Revenue estimate
Sequoia Healthcare District - Special Needs Grant FY20-23	19510-2643	339,000		169,500	169,500	50%	\$169K is Q1&Q2 Sequoia Healthcare District Special Needs Grant Revenue estimate
Sequoia Healthcare District - Mental Health Grant FY20-23	19510-2643	57,000		28,500	28,500	50%	\$28K is Q1&Q2 Sequoia Healthcare District Mental Health Grant Revenue estimate
Aurrera Health Group - ACES Aware	19510-2643		8,580	0	8,580		
CHI Refund	19510-2643		171,750		171,750		
F5SMC Wellness Grant	19510-2658			0	0		
Miscellaneous Reimbursements	19510-2647			0	0		
<b>TOTAL REVENUES</b>		<b>6,260,000</b>	<b>2,364,681</b>	<b>1,921,816</b>	<b>4,286,497</b>	<b>68%</b>	Total Revenue is neutral variance, which is in line with the planned budget
<b>TOTAL AVAILABLE FUNDS (TOTAL SOURCES*)</b>		<b>16,089,030</b>	<b>12,193,712</b>	<b>1,921,816</b>	<b>14,115,528</b>	<b>88%</b>	
<b>APPROPRIATIONS</b>							
<b>PROGRAM APPROPRIATIONS</b>							
<b>D1. Strategic Plan Investment - SPIP FY 20-23</b>		<b>3,780,000</b>	<b>795,263</b>	<b>945,000</b>	<b>1,740,263</b>	<b>46%</b>	
Resilient Family	19540-6125	1,060,000	237,331	265,000	502,331	47%	\$265K is Q2 expenditure estimate
Healthy Children	19540-6156	1,060,000	253,282	265,000	518,282	49%	\$265K is Q2 expenditure estimate
Quality Care and Education	19540-6263	1,060,000	174,948	265,000	439,948	42%	\$265K is Q2 expenditure estimate
Policies, Advocacy, & Communications	19540-6814	335,000	118,792	83,750	202,542	60%	\$83K is Q2 expenditure estimate
Kit for New Parent KNP (KNP)	19540-6814	45,000		11,250	11,250	25%	KNP inventory variances based on lower KNP distribution due to COVID and cost saving measures.
Emerging Projects	19540-6814	107,000	0	26,750	26,750	25%	Alling emerging projects based on evolving community needs
Grant Management and Other Evaluation Projects	19540-6265	113,000	10,911	28,250	39,161	35%	Possible emerging support needs for the evaluation related to data collection.
<b>D2. Strategic Plan Investment - SPIP FY 18-20 Carry-Over</b>		<b>1,120,000</b>	<b>26,825</b>	<b>280,000</b>	<b>306,825</b>	<b>27%</b>	Underspending is due to pending planning and implementation of the SPIP FY 2018-20 Carry Over Funds are in coordination within the 3-year time frame of the new strategic plan FY 2020-23
Children Health & Development - Carry Over	19540-6156	300,000		75,000	75,000	25%	Per the Commission approval, SPIP FY18-20 carry over will be expended through June 30, 2023.
Early Learning - Carry Over	19540-6263	100,000	21,815	25,000	46,815	47%	
Other Evaluation Projects - Carry Over	19540-6265	350,000		87,500	87,500	25%	
PAC - Carry Over	19540-6814	250,000	3,675	62,500	66,175	26%	
Emerging Projects - Carry Over	19540-6814	120,000	1,335	30,000	31,335	26%	
<b>E. Other Grants</b>		<b>954,000</b>	<b>164,214</b>	<b>238,500</b>	<b>402,714</b>	<b>42%</b>	
F5CA IMPACT Grant	19540-6126	350,000	40,396	87,500	127,896	37%	\$87.5K is Q2 expenditure estimate
F5CA Home Visiting Grant		89,000	18,000	22,250	40,250	45%	
F5SF IMPACT HUB TA FY21-22	19540-6126		19,573	0	19,573		
Mental Health Services MHSA Prop 63	19540-6131	64,000	50,686	16,000	66,686	104%	
Peninsula Healthcare District - HMG Call Center Grant CY2021	19540-6131	42,000	15,819	10,500	26,319	63%	
David Lucile Packard- Help Me Grow CY2020	19540-6131	58,000		14,500	14,500	25%	Braided funding are in process
Sequoia Healthcare District - Special Needs Grant	19540-6131	317,000	3,865	79,250	83,115	26%	Braided funding are in process
Sequoia Healthcare District - Mental Health Grant	19540-6131	34,000	3,598	8,500	12,098	36%	Braided funding are in process
Aurrera Health Group - ACES Aware	19540-6131		12,277	0	12,277		

	ORG/ACCT#	FY21-22 Adopted Budget	YTD Actuals as of December 31, 2021	Accruals	YTD Combined	YTD Combined vs. FY21-22 Adopted Budget (%)	Notes to Budget Monitoring Report
<b>F. Program Operations</b>		1,265,149	534,895	1,431	536,326	42%	
Program Shared Operating Budget		206,300	83,415	1,431	84,846	41%	
Program Staff S&B & Shared Admin Staff Time		873,309	377,282	0	377,282	43%	
Evaluation Staff S&B		185,540	74,198	0	74,198	40%	
<b>Total Program Appropriations (D1+D2+D3+E+F)</b>		<b>7,119,149</b>	<b>1,521,197</b>	<b>1,464,931</b>	<b>2,986,129</b>	<b>42%</b>	
<b>ADMIN APPROPRIATIONS</b>							
G. Admin Shared Operating Budget		206,300	83,415	1,431	84,846	41%	
H. Admin Staff S&B		605,810	269,453	0	269,453	44%	
<b>Total Administrative Appropriations</b>		<b>812,110</b>	<b>352,868</b>	<b>1,431</b>	<b>354,299</b>	<b>44%</b>	
Administrative Cost Rate %		10%	19%	0%	11%		
<b>TOTAL APPROPRIATIONS (NET APPROPRIATIONS*)</b>		<b>7,931,259</b>	<b>1,874,066</b>	<b>1,466,362</b>	<b>3,340,428</b>	<b>42%</b>	Underspending is due to pending planning and implementation of the SPIP FY 2018-20 Carry Over Funds are in coordination within the 3-year time frame of the new strategic plan FY 2020-23
<b>ENDING FUND BALANCE (ENDING RESERVES*)</b>		<b>8,157,771</b>	<b>10,319,646</b>	<b>455,454</b>	<b>10,775,100</b>	<b>132%</b>	Positive variance due to underspending in both Program and Administrative Appropriations

2,617,329

**Color Coding**

Shared Budget/Shared Cost  
Revenue : Fund Balance  
Appropriations  
Salaries & Benefits


**Note 1:**

At the March 26, 2018 Commission Meeting, Commission reviewed and approved the use of Reserves\* to fund the approved FY17-18 Revised Budget. At the same time moving forward, F5SMC will add budget terminologies used by the County to F5SMC Budget for a comparable reading with County internal budget system.

\*Total Sources, Net Appropriations, Reserves, Total Requirements with asterisk \* are budget terminologies used by the County of San Mateo.

**Note 2:**

This Budget Monitoring Report is presented in a Hybrid Format as per suggestion of Finance and Administration Committee members.

The YTD Actuals column reflects Actual Revenues and Actual Expenditures reported in Countywide OFAS Accounting System.

The YTD Accruals\* (with an asterisk) column is a hybrid presentation using Modified Accrual Accounting or Projections. When Revenue and Expenditures are not measurable in monetary terms or are not available, Committee members suggest to make a Projection for the reporting month.

**Technical Terms****1. Modified Accrual**

Under Modified Accrual, Revenue is recognized and recorded when measurable and available to finance the expenditures of the current period; Available, under Modified Accrual, means collectible within the current period or soon enough to be used to pay liabilities of the current period; Measurable means quantifiable in monetary terms. Per F5CA, Prop 10 Tax Revenue is recorded when the Prop 10 Tax Revenue is posted on the F5CA website.

Expenditures are recognized and recorded when the related liability incurred with some exceptions.

**2. Internal Reporting**

The Budget Monitoring Report is an internal report, typically is designed to accomplish two goals:

- allows management to monitor compliance with legal and contractual provisions applicable to the management of public funds; and
- provides management with the information on current performance that it needs to make future financial plans.

Because internal reports are designed to serve the needs of management, management is free to select the format and content it believes is most relevant, with timeliness being a key consideration for their use as monitoring or planning documents.

**References**

- Modified Accrual: Becker CPA Review, Financial, 2009 Edition Textbook, page F8-12
- Internal Reporting: First 5 Association of California - Financial Management Guide - Fifth Edition, 2015, Updated 12/15/15, page 51

Schedule 1- OPERATING BUDGET MONITORING REPORT as of December 31, 2021

YTD Benchmark: 50%

ORG / ACCT#	FY20-21 Adopted Budget	YTD Actuals as of December 31, 2021	Accruals	YTD Combined	YTD Combined vs. FY21-22 Adopted Budget (%)	Notes to Budget Monitoring Report	
<b>I. Services and Supplies</b>							
Outside Printing & Copy Svc	19510-5191	2,000		0	0%		
General Office Supplies	19510-5193	8,000	1,487	1,487	19%		
Photocopy Lease & Usage	19510-5196	5,000	201	201	4%	Underspend due to staff work outside office.	
Computer Supplies	19510-5211	15,000	1,188	1,188	8%	Subscription of Microsoft software licenses. Underspending in IT equipment emergency fund (place holder)	
County Memberships - (e.g. F5 Assn Dues)	19510-5331	15,000	12,306	12,306	82%		
Auto Allowance	19510-5712	11,000	5,296	5,296	48%		
Meetings & Conference Expense	19510-5721	10,000	0	0	0%		
Commissioners Meetings & Conference Exp	19510-5723	5,000		0	0%		
Other Business Travel Expense	19510-5724	10,000	8	8	0%		
Dept. Employee Training Expense	19510-5731	7,000	5,234	5,234	75%		
Wellness grant	19510-5856	0	1,021	1,021			
Other Professional Services	19510-5858	30,000	29,067	29,067	97%	Racial and Equity Consultation - Part 2.	
<b>Sub Total - Services &amp; Supplies</b>		<b>118,000</b>	<b>55,808</b>	<b>-</b>	<b>55,808</b>	<b>47%</b>	Underspending associated with staff works outside office.
<b>II. Other Charges</b>							
Telephone Service Charges	19510-6712	5,500	1,036	1,036	19%	Include direct Communication Services	
Automation Services - ISD	19510-6713	57,000	24,598	24,598	43%		
Annual Facilities Lease	19510-6716	105,000	31,105	31,105	30%	Nov/Dec 2021 free rent per new Lease Amendment.	
General Liability Insurance	19510-6725	10,500	4,193	838	5,031	48%	
Official Bond Insurance	19510-6727	800	119	23	142	18%	
Human Resources Services	19510-6733	2,000	303		303	15%	One-time annual fee t for countywide online learning platform
Countywide Security Services	19510-6738	800	556		556	70%	
All Other Service Charges	19510-6739	60,000	24,508	2,000	26,508	44%	\$2K is Nov/Dec County Counsel expenditure estimate
A-87 Expense	19510-6821	53,000	24,605		24,605	46%	
<b>Sub Total - Other Charges</b>		<b>294,600</b>	<b>111,023</b>	<b>2,861</b>	<b>113,884</b>	<b>39%</b>	
<b>Total Operating Budget</b>		<b>412,600</b>	<b>166,830</b>	<b>2,861</b>	<b>169,691</b>	<b>41%</b>	Underspending due to staff works outside office.
<b>Program Shared Operating Budget</b>		<b>206,300</b>	<b>83,415</b>	<b>1,431</b>	<b>84,846</b>	<b>41%</b>	Allocation rate 50%
<b>Admin Shared Operating Budget</b>		<b>206,300</b>	<b>83,415</b>	<b>1,431</b>	<b>84,846</b>	<b>41%</b>	Allocation rate 50%

Schedule 2 - SALARIES & BENEFITS BUDGET MONITORING REPORT as of December 31, 2021

Program Staff & Shared Admin Staff	873,309	377,282		377,282	43%	27% Admin staff time allocated to Program
Evaluation Staff	185,540	74,198		74,198	40%	
Admin Staff	605,810	269,453		269,453	44%	
<b>Total Salaries and Benefits</b>	<b>\$ 1,664,659</b>	<b>\$ 720,933</b>	<b>\$ -</b>	<b>\$ 720,933</b>	<b>43%</b>	Underspend associated with staff on medical leave

Color Coding

- Shared Budget/Shared Cost
- Revenue ; Fund Balance
- Appropriations
- Salaries & Benefits
