The Persimmony System

F5SMC Commission Meeting
August 27, 2018

Persimmony

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

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

For more information, visit: https://persimmony.com
Successes

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

Challenges

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

Ongoing Custom Development

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

Questions and/or Comments?
FIRST 5 SAN MATEO COUNTY’S ACCOMPLISHMENTS - FISCAL YEAR 2017 - 2018

INCREASE IN F5SMC COMMUNICATIONS:

- New Website
- New Social Media Presence on multiple platforms
- Impact Stories produced for F5 Advocacy Day in Sacramento on May 2, 2018
SECURED $687,000 ADDITIONAL REVENUE FOR VARIOUS PROGRAMS AND INITIATIVES

REPORTED IN F5SMC LONG TERM FINANCIAL PLAN IN JUNE, 2018

Persimmony Grants Management Software Implementation to streamline processes & procedures

Engaged two new Commissioners:

Rosanne Foust, CEO/President SAMCEDA and Nicole Pollack, HSA Director
Ensured Family Engagement services/programs of SMC Big Lift Initiative continued due to the loss of Federal Social Innovation Fund dollars

Completed all contracts for Community Investments for 2018 - 2020

Expanded systems work with SMC Human Services Agency:

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

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

EXPANSION OF COMMISSIONER AND STAFF ROLES AS LEADERS/CONVENERS:

- Trauma Informed Initiative
- Build-Up for SMC Children’s Initiative
- Chairing SMC Oral Health Coalition
First 5 San Mateo County Strategic Plan 2015-2020 Revision

Michelle Blakely, First 5 San Mateo County
Christina Bath Collosi, VIVA Strategy + Communications
August 27, 2018

F5SMC Strategic Plan Revision

Revision Process – remains the same:
• Vision
• Mission
• Desired outcomes
• Commission Roles in the Community
• Focus Area Framework

Revision Process – primary changes:
• Strategies within Focus Areas
• Indicators to Measure Progress
Persistent Challenge

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

Financials Over Time
Prepared May 2018

Strategic Plan Revision Period
Commission: Plan Revision Touchpoints

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

**August 27, 2018:** Strategies for Investment

**October 22, 2018:** 2020-2025 Strategic Plan Adoption

Our kids!
Proposed Strategies

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

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

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

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

Thank you!