

*** PUBLIC HEARING MEETING NOTICE***

**FIRST 5 SAN MATEO COUNTY (F5SMC)
COMMISSION MEETING**

DATE: Monday, May 19, 2025

TIME: 4:00 PM – 6:00 PM

**San Mateo County Office of Education
101 Twin Dolphin Drive, 1st Floor Conference Room
Redwood City, CA 94065**

Participate via Zoom for Public Members

<https://smcgov.zoom.us/j/92952928173>

Phone: +1 669 900 6833, Webinar ID: 929 5292 8173

PLEASE NOTE: This meeting will be held in a hybrid format with both in-person and Zoom participation options for members of the public; Commission members shall appear in person

This meeting of the First 5 San Mateo County Commission will be held at the address above in the San Mateo County Office of Education on the first floor at 101 Twin Dolphin Drive, Redwood City and by teleconference pursuant to California Assembly Bill 2449 and the Ralph M. Brown Act, CA Gov't Code. Section 54950, et seq. **Members of the First 5 San Mateo County Commission are expected to attend the meeting in person.** For information on exceptions allowed by law please reach out to counsel for First 5, Jennifer Stalzer, at jstalzer@smcgov.org. For information regarding how to participate in the meeting, either in person or remotely, please refer to the instructions at the end of the agenda.

AGENDA		
Call to Order and Preliminary Business		
1	Roll Call	4:00 PM
2	Public Comment	
3	Action to Set Agenda for May 19, 2025, Meeting and Approve Consent Agenda Items <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>	
4	Commission Announcements	4:05 PM
5	Storytelling: Oral Health Video	4:10 PM
Discussion Item		

6	Presentation and Update: Strategic Plan Implementation Plan (SPIP) Procurement Process Updates for FY2025 – 2028, and Resilient Families Focus Area: Family Connectivity and Leadership and Early Childhood Mental Health Services (Round 1) by Michelle Blakely, Deputy Director, Jenifer Clark, Research and Evaluation Specialist, and Emily Roberts, Strategic Initiatives Project Manager, First 5 San Mateo County <i>(See Attachment 6)</i>	4:15 PM
Action Items:		
7	Recommendation by F5SMC Staff and Proposal Review Panel to Commission for Approval of Awards totaling \$2,100,000 to support Early Childhood Mental Health Services, with proposed terms of July 1, 2025 through June 30, 2028 and direction to Staff to Conduct Contract Negotiations with up to 5% Variance and Contract Execution Regarding Same for the Following Agencies: a) Ayudando Latinos A Sonar (ALAS) for a total amount of \$600,000 b) Community Overcoming Relationship Abuse (CORA) for a total amount of \$600,000 c) One Life Counseling Center for a total amount of \$600,000 d) Peninsula Family Connections for a total amount of \$150,000 e) Puente de la Costa Sur for a total amount of \$150,000 <i>(See Attachment 7)</i>	4:35 PM
8	Approval of First 5 San Mateo County Policies and Bylaws for FY 2025 - 2026 By Kitty Lopez, Executive Director, First 5 San Mateo County <i>(See Attachment 8)</i>	5:00 PM
9	Approval of F5SMC's FY 2025-26 Draft Budget and the Use of Ending Fund Balance (Reserves*) to Fund F5SMC's FY 2025-26 Adopted Budget Presentation by Kitty Lopez, Executive Director, First 5 San Mateo County <i>(See Attachment 9)</i>	5:10 PM
Informational Items		
10	Report of the First 5 San Mateo County Staff Team By Kitty Lopez, Executive Director, First 5 San Mateo County <i>(See Attachment 10)</i>	5:30 PM
11	Committee Updates <i>(See Attachment 11)</i>	5:40 PM
12	Adjournment	6:00 PM

Public Participation:

The May 19, 2025, First 5 San Mateo County Commission meeting may be accessed through Zoom link at the top of this agenda. The May 19, 2025, First 5 San Mateo County Commission meeting may also be accessed via telephone by dialing 1 669 900 6833. Enter the webinar ID: Webinar ID: 996 2226 6925, then press #. (Find your local number:

<https://smcgov.zoom.us/j/acBJLZqb6r>). Members of the public can also attend this meeting physically in the **San Mateo County Office of Education, 101 Twin Dolphin Drive, 1st Floor Conference Room, Redwood City, CA 94065**

*Written public comments may be emailed to ecruz@smcgov.org, and such written comments should indicate the specific agenda item on which you are commenting.

*Spoken public comments will be accepted during the meeting in person or remotely through Zoom at the option of the speaker. Public comments via Zoom will be taken first, followed by speakers in person.

***Please see instructions for written and spoken public comments at the end of this agenda.**

ADA Requests

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 meeting, should contact Michelle Blakely, Deputy Director, as early as possible but no later than 10 a.m. on Friday, May 16, 2025, at ecruz@smcgov.org. Notification in advance of the meeting will enable the County to make reasonable arrangements to ensure accessibility to this meeting, the materials related to it, and your ability to comment.

***Instructions for Public Comment During Hybrid Meetings**

During hybrid meetings of the First 5 San Mateo County Commission, members of the public may address the Members of the First 5 San Mateo County Commission as follows:

***Written Comments:**

Written public comments may be emailed in advance of the meeting. Please read the following instructions carefully:

1. Your written comment should be emailed to ecruz@smcgov.org
2. Your email should include the specific agenda item on which you are commenting or note that your comment concerns an item that is not on the agenda or is on the consent agenda.
3. Members of the public are limited to one comment per agenda item.
4. The length of the emailed comment should be commensurate with the two minutes customarily allowed for verbal comments, which is approximately 250-300 words.
5. If your emailed comment is received by 5:00 p.m. on Friday, May 16, 2025, it will be provided to the Members of the First 5 San Mateo County Commission and made publicly available on the agenda website under the specific item to which your comment pertains. If emailed comments are received after 5:00p.m. on Friday, May 16, 2025, the First 5 San Mateo County Staff will make every effort to either (i) provide such emailed comments to the First 5 San Mateo County and make such emails publicly available on the agenda website prior to the meeting, or (ii) read such emails during the meeting. Whether such emailed comments are forwarded and posted, or are read during the meeting, they will still be included in the administrative record.

***Spoken Comments**

In person Participation:

1. If you wish to speak to the First 5 San Mateo County Commission, please fill out a speaker's slip located at the front entrance table. If you have anything that you wish distributed to the First 5 San Mateo County Commission and included in the official record, please hand it to the First 5 San Mateo County who will distribute the information to the First 5 San Mateo County Commission members and staff.

Via Teleconference (Zoom):

1. The May 19, 2025 First 5 San Mateo County Commission meeting may be accessed through Zoom online at the links and telephone numbers listed above.
2. You may download the Zoom client or connect to the meeting using an internet browser. If using your browser, make sure you are using a current, up-to-date browser: Chrome 30+, Firefox 27+, Microsoft Edge 12+, Safari 7+. Certain functionality may be disabled in older browsers including Internet Explorer.
3. You will be asked to enter an email address and name. We request that you identify yourself by name as this will be visible online and will be used to notify you that it is your turn to speak.
4. When the First 5 San Mateo County Commission Chair calls for the item on which you wish to speak, click on "raise hand." Speakers will be notified shortly before they are called to speak.

***Additional Information:**

For any questions or concerns regarding Zoom, including troubleshooting, privacy, or security settings, please contact Zoom directly.

Public records that relate to any item on the open session agenda for a regular First 5 San Mateo County 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 First 5 San Mateo County Commission.

First 5 San Mateo County Commission Meeting

CONSENT AGENDA

May 19, 2025

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.

- 3.1 Approval of the April 28, 2025 Commission Meeting Minutes
(See Attachment 3.1)

First 5 San Mateo County (F5SMC)
COMMISSION MEETING MINUTES
APRIL 28, 2025
San Mateo County Office of Education
101 Twin Dolphin Drive, 1st Floor Conference Room
Redwood City, CA 94065

Call to Order & Roll Call

1. Roll Call

Commission Members: Carla Boragno, Claire Cunningham, Colleen Chawla, Sylvia Espinoza, Hanish Rathod, Nkia Richardson, Jackie Speier

Youth Commission: Adele Ryono

Absent: Nancy Magee, Naveen Mahmood
Rikhav Shah (Youth Commission)

Staff: Kitty Lopez, Michelle Blakely, Khanh Chau, Emily Roberts,
Jenifer Clark, Mai Le, Mey Winata, Myra Cruz

County Counsel: Jennifer Stalzer

A quorum was present. Commission Chair Richardson called the meeting to order at 4:04 PM; roll call was taken. The meeting was held in a hybrid format where the public had the option to attend the meeting in person or virtually.

2. Public Comments: None

3. Action to Set Agenda for April 28, 2025, Meeting and Approve Consent Agenda Items:

MOTION: RATHOD / SECOND: ESPINOZA

AYES: BORAGNO, CUNNINGHAM, CHAWLA, ESPINOZA, RATHOD, RICHARDSON,
SPEIER

AYES - YC: RYONO

NOES: NONE

ABSTAIN: NONE

Motion approved.

Public Comments: None

4. Commission Announcements: None

5. **Storytelling: First 5 Work/Impact: Dr. Neel Patel, Pediatrician, Former First 5 San Mateo County Commissioner, Help Me Grow Physician Champion, and Vice President of American Academy of Pediatrics California Chapter 1**

Kitty Lopez, F5SMC's Executive Director, welcomed the presenter, Dr. Neel Patel, and provided a brief background on him, noting his service on the First 5 Commission from 2015 to 2021.

Dr. Neel Patel shared a poem that he felt represents First 5. He explained that it is based off a verse in an ancient Sanskrit text about how a son's birth helps us to keep going and keep fighting, as the seeds we plant make an impact years later, and we should find freedom in working with joy, and through it all be able to stand firm, unmoved by loss or gain.

His journey with First 5 began years ago as a young pediatrician. While working at San Mateo Medical Center, he first met Michelle Blakely and Emily Roberts. They found common ground through a conversation about how to better advocate for mothers struggling with breastfeeding. Since then, First 5 has felt like both a family and a close circle of friends. Over the years, their relationship has helped him grow and stay committed to his advocacy for children, families, and the broader community. From his early days as a new pediatrician to his current role as a former Commissioner—and soon-to-be President of Chapter 1 of the American Academy of Pediatrics—First 5 has remained a constant presence in his professional journey.

The poem Dr. Neel Patel read was entitled “The Work Alone”

The Work Alone

O soul that toils beneath the sun,
Your task is yours, the prize is none.
Plant seeds with care, but let them fly,
Their bloom is not your ‘how’ or ‘why’

The hand must weave, the heart must sow,
Yet let not thirst for harvest grow
Act not for gold, nor for fear of rain,
Nor freeze your will to dodge the pain.

The River Moves, the winds will spin
But none owns the streams within
Thus work with joy and fearless be
In doing, find your liberty

Release the fruits; they are not thine
The labor pure is the divine
Stand firm, unmoved by loss or gain
In duty's fire, be cleansed of pain

(based off the Bhagavad Gita Verse 2.47)
Public Comments: None

6. **Approval of Persimmony International, Inc., for a Grants Management and Data System, Agreement in an Amount not to exceed \$270,303, Contract Term Effective July 1, 2025 through June 30, 2028.**

Kitty Lopez provided background on Persimmony, consulted with the county counsel, and provided justification for continuing the Sole Source contract versus switching to another company. Jenifer Clark, F5SMC's Research and Evaluation Specialist provided positive comments and supporting reasons in favor of utilizing with Persimmony.

MOTION: CUNNINGHAM / SECOND: BORAGNO

AYES: BORAGNO, CUNNINGHAM, CHAWLA, ESPINOZA, RATHOD, RICHARDSON, SPEIER

AYES - YC: RYONO

NOES: NONE

ABSTAIN: NONE

The Commission made comments and asked questions.

Public Comments: None

7. **Presentation: First 5 San Mateo County Infant and Early Childhood Mental Health Systems (ECMH) Components: Early Childhood Mental Health Landscape Scan**

Emily Roberts, F5SMC's Strategic Initiatives Project Manager, and Jenifer Clark presented the ECMH Systems Components and Landscape Scan. They highlighted the following:

- California ranked last in terms of the difficulty of obtaining mental health care for children
- Centers for Disease Control and Prevention (CDC) statistics on young children experiencing mental health challenges (between 1:6 and 1:10), with higher rates for those living in poverty (1:4)
- The pandemic elevated mental health concerns
- Children with special needs have 10 times the rate of mental health in addition to higher likelihood of multiple adverse childhood experiences
- Purpose of ECMH Landscape Scan - to determine who currently provides services and supports young children and families
- Purpose of Centering Family Voice project - to see what can be learned from families' experiences on the topic of mental health
- Purpose of ECMH 101 sessions and Ripple Effect training - to build knowledge about ECMH
- purpose of SMC ECMH Network - to support providers by building community, resources, and connection
- Role of F5SMC as a conduit, as a weaver and funder, with the help of the Department of Health Care Services, Youth Behavioral Help Initiative, and Mental Health Services Act
- Importance of young children learning to regulate their emotions and having therapists who can work both with the caregiver and the child to help them bond and co-regulate

- Pro publica study, “Why I left the Network,” interviewing therapists about their reasons for leaving insurance networks
- HPSM contracts directly with 14 providers, and members can call providers without a referral and do not need a diagnosis and there's no waitlist F5SMC tried to interview Medi-cal providers and private insurers, but almost none of the private insurers responded
- Difficulties for parents of children with mental health issues or who are having a hard time bonding with their children due to stigma around mental health conditions and services, not being able to find clinicians who are culturally and linguistically able to communicate with them
- Proportion of families referred to ECMH- some through HPSM, some through school districts, other nonprofits, and only 1% of the clients are referred through private insurance.
- Irony is that 75% of the children in SMC are covered by private insurance, 25% are covered by Medi-cal.

Public Comments: None

Commission made comments and asked questions.

The Power Point Presentation can be found on the F5SMC's website, [April 28, 2025 Commission Meeting Presentations.](#)

8. Presentation: First 5 San Mateo County Infant and Early Childhood Mental Health Systems Components: Centering Family Voice Project

Presenters Thomas Both, Gabriela Buendia, Jasmine Pena, and Yormeri Vega shared valuable insights from the Centering Family Voice Project, including key takeaways from their conversations with parents. They highlighted the following points:

- The Centering Family Voice project is about understanding what families face when seeking early childhood mental health care, focusing on Latino families who face greater barriers to care.
- Interviewing parents about early childhood mental health challenges, and then as a team with our different perspectives and experiences, retelling those stories to each other.
- Interviews revealed the struggles of these parents had, how they felt alone and felt like they didn't have anybody there for them and guide them through anything when they needed support for their children's mental health issues
- They would listen to multiple parents have discussions with each other, as well as talk to parents one-on-one
- Latino parents faced language barriers, fears around immigration status, power imbalances with providers or other professionals, parents felt dismissed, needing help through the Individual Education Plan (IEP) process at schools, and losing helpful due to a lapse in Medi-Cal eligibility
- Preschool is usually the first indicator that a child is struggling because it's where a child will let us know they're struggling through their behaviors, but preschools often come up short in helping parents navigate to care.

- Parents often rely on a helpful person they know to direct them and help them navigate the system, and to trust the system
- Working with local delegation on passing a California law that would ensure continuous Medi-Cal coverage for children ages 0-5
- Currently creating a website hub: “Big Feelings”, for childhood mental health or adding a section to F5SMC website to facilitate understanding children’s mental health, early childhood mental healthcare, and helping connect parents with support they need

Commission asked questions.

Public Comments: None

The Power Point Presentation can be found on the F5SMC’s website, [April 28, 2025 Commission Meeting Presentations.](#)

9. **Presentation: First 5 San Mateo County Infant and Early Childhood Mental Health Systems Components: Children and Youth Behavioral Health Initiative**

Sarah Dobkin, San Mateo County Infant and Early Childhood Mental Health (IECMH) Network Manager shared information about Children and Youth Behavioral Health Initiative (CYBHI) and highlighted the following:

- Children and Youth Behavioral Health Initiative is state funded project aimed at solving the current crisis of mental health for families with young children while increasing awareness and challenging insurance sustainability.
- Parent-child relationship is important since we cannot treat one without treating the other, both must be treated
- Concept of the “ghost of the nursery” -- when parents are with their baby, there are ghosts of their past experiences that the baby evokes in them which are the feelings that a parent has around their baby, which may be derived from the parent’s past traumas or experiences
- Families and providers are interacting with many systems daily that can either support or hinder their healing.
- We need to keep thinking about how our systems are hearing, what our providers are saying, what our families are saying now, and the frame of reference they have for interpreting that feedback
- We need to target more than just mental health providers and consider the ways that families are being supported
- Changes are necessary in policy, organizations, and to ensure sustainability in supported families who have children with mental health needs
- Two components or goals are networking and training
- We need to equip our clinical workforce with specialized skills, address the current challenges for families and foster an understanding and connection to young children across various sectors.

- challenge of providers leaving the county or the field because they can't sustain their own lifestyle or their own families here.
- connecting with other providers can reduce burnout and help people stay connected to their work and to each other
- Childcare Therapy training, an 18 month training funded by CYBHI, from the child trauma research program currently has 63 clinicians participating in that from 7 organizations.
- Trauma informed practice training such as Ripple Effect training from UCSF child trauma research program, an integrative framework for understanding and communicating across systems, looking beyond mental health providers, trying to find language that is accessible to everyone.
- Goal of reducing the impact of trauma exposure for families, looking at trauma theory across systems beyond mental health systems, getting schools and medical practitioners, police, everyone interacting with families to using the same language
- ECMH 101 and New Matter in the Lives of Young Children training - trainings on core concepts of early childhood mental health such as “attachment” and “co-regulation”

Commission asked questions.

Public Comments: None

The Power Point Presentation can be found on the F5SMC's website, [April 28, 2025 Commission Meeting Presentations](#).

10. First 5 San Mateo County Communications Analytics Performance

Laura Bowen, Communications Director, VIVA Social Impact Partners- F5SMC's communications firm- shared the following highlights regarding F5SMC's social media performance and website traffic:

For Instagram and Facebook:

- We have seen yearly growth across all the key metrics, with F5SMC outperforming others, and the audience is engaged
- F5SMC has a high follower to population ratio compared to other counties
- Social media content is driving traffic to high priority content areas of the F5SMC website

For Instagram:

- In the first 4 months of 2025, there were 2000+ more impressions and triple the content interactions compared all of 2024 for Instagram

For Facebook:

- F5SMC is reaching over 18% of the population in terms of both followers and SMC viewers in general

For LinkedIn

- Increased in conversation on LinkedIn, especially related to things happening at the federal level

Social Media Overall:

- increase in organically viewed content (content gets viewed randomly without us paying for it to be viewed)
- increase in viewing of content that has been paid for in terms of boosting its visibility.

Commission asked questions.

Public Comments: None

The Power Point Presentation can be found on the F5SMC's website, [April 28, 2025 Commission Meeting Presentations](#).

11. Report of the First 5 San Mateo County Staff Team

Kitty Lopez reviewed Attachment 11 Staff Team Report which is included in the [Commission Packet](#). Lopez highlighted the following:

- Baby Bonus Program launched on March 24, 2025, and enrolled over 10 families as of date.
- Article states on Head Start funding may be eliminated under sweeping budget cuts proposed by the White House.
- Op-ed by Christine Padilla, Executive Director of Build Up San Mateo County titled, "Why Head Start Matters to Every Child in San Mateo County"
- F5SMC will be participating to two local events in Colma and San Bruno Park School District to share resources with families.
- F5SMC is included in Center for the Transition to Parenthood nationwide online resource site.

Public Comments: None

12. Committee Updates

Program, Operations and Planning Committee Meeting:

Commissioner Richardson reported that the Committee met on April 7, 2025, to discuss the Strategic Plan Implementation Plan (SPIP), including the procurement process, Mental Health Services Act funding, an update on the Baby Bonus Program, and policy updates from the First 5 Association.

Public Comments: None

13. Meeting Adjourned at 5:55 pm

DATE: May 19, 2025,
TO: First 5 San Mateo County Commission
FROM: Kitty Lopez, Executive Director
RE: Presentation and Update: Strategic Plan Implementation Plan (SPIP)
 Procurement Process for FY2025 – 2028 and Resilient Families Focus Area:
 Family Connectivity & Leadership and Early Childhood Mental Health Services
 (Round 1)

ACTION REQUESTED

No action required. Presentation and Update: Strategic Plan Implementation Plan (SPIP)
 Procurement Process for FY2025 – 2028 and Resilient Families Focus Area: Family Connectivity &
 Leadership and Early Childhood Mental Health Services (Round 1)

BACKGROUND

Strategic Plan Implementation Plan was previously approved at the January 27, 2025 Commission Meeting. The Strategic Plan (2025-2030) was also previously approved at the December 16, 2024 Commission Meeting. The resulting Strategic Plan Implementation Plan (SPIP) directs activities and investments in 4 core Focus or Domain Areas: Quality Care and Education, Healthy Children, Resilient Families and Policy, Advocacy and Communications (PAC). To achieve desired outcomes, five strategies will support the goal of impacting children and families across these four Core Domains (1) Capacity & Network Building, (2) System Navigation and Care Coordination, (3) Family Connectivity & Leadership, (4) Weaving Transformational Change and (5) Policy Advocacy & Community Education (PAC). This includes Evaluation & Research and Staff work to support the domain areas with data collection & analysis, monitoring trends, identifying emerging issues, and informing program and policy development.

SPIP funding allocations for activities and investments are also aligned with the Long-Term Financial Plan. It involves two funding phases: Phase One is a three- year period from July 1, 2025, to June 30, 2028; and Phase Two is a two-year period from July 1, 2028, to June 30, 2030. The SPIP funding amounts apply to Phase One only and depicts community investments for 3 years beginning on July 1, 2025, totaling \$7,800,000. The SPIP budget total, is on average, a 30% reduction from community investments in FY 20 – 25 as a result of declining Tobacco Tax revenue. These investment amounts were presented and approved by the Commission in the Long-Term Financial Plan of June 2024.

At the January 27, 2025 Commission Meeting, the Commission also approved a reallocation of FY 23-25 unspent Carry-Over funds, in the amount of \$650,000, to augment the new Strategic Plan Implementation (2025- 2030).

SPIP PROCESS OVERVIEW

The presentation today provides a review of the procurement process and timeline for the SPIP, and an update on the funding mechanism for Resilient Families: Family Connectivity & Leadership and Early Childhood Mental Health Direct Services. **(Attachment 6.1 SPIP # 6 & 7)**

SPIP Phase One (FY 2025-2028) funding is being rolled out in “Rounds” in order to strategically prioritize funding of certain investment strategies to be sooner than others. Today’s recommendations are being referred to as “Round 1.” This staggered approach to the SPIP procurement allows the Commission to achieve better timing and alignment with other county-wide

and statewide initiatives, funding opportunities, provide as much advance notice as possible to current grantees transitioning off our funding, and manage the F5SMC staffing demands involved with multiple, simultaneous procurement processes. Contract start dates are July 1, 2025.

Procurement Review Process

The RFP/procurement process included vetting of proposals with a panel of external experts and F5SMC staff knowledgeable about the field of early childhood development, family engagement, and early childhood mental health. The review panel conducted in-depth discussions about the submissions and used a standard rating rubric to arrive at final recommendations.

Supporting Attachments

The attached supporting documents correlate with all SPIP procurements including the funding recommendation on Agenda item # 7 and are referenced for clarity, any recusals, recommendation, and approvals.

- Attachment (6.1) Strategic Plan Implementation Plan (SPIP) FY 2025-2028
- Attachment (6.2) Procurement Strategies/Funding Mechanisms.
- Attachment (6.3) Appeals Process Language

SPIP UPDATES AND APPROVALS ON MAY 19, 2025, COMMISSION MEETING

Parent Connectivity & Leadership: \$225,000 over three years: Presentation and Update

Re-released RFP on April 29, the purpose of this RFP is to fund activities that will: 1) develop parent-to-parent networks of support in order to promote resilient families, and 2) build capacity for parents to advocate for themselves and their children and to gain leadership skills.

A Review Panel reviewed 6 proposals on May 6th and recommended funding two of these proposals pending available budget. Concurrently, F5SMC staff have submitted a proposal for outside grant funding to compliment the Commission's investment of \$225,000. On May 21st staff should be notified if this funding was secured. The panelists recommended that F5SMC wait until notification of funding availability prior to making a final determination regarding the Parent Connectivity & Leadership awardee(s).

Once we confirm all available funding through both braided and F5SMC processes, the review panel recommended that F5SMC staff make the final decision about how to allocate resources in a way that provides the most value to the young children and families of San Mateo County.

Updated Timeline for Parent Connectivity & Leadership procurement process:

1. Receive notification about braided funding on May 21st.
2. Determine whether one of the two Parent Connectivity and Leadership proposals being considered for funding can be incorporated into the upcoming process:
 - a. If so, fund both proposals under consideration.
 - b. If not, F5SMC staff will consider how best to allocate the available resources to achieve the goals identified in the RFP. This could mean fully funding one of the two proposals, or funding aspects of each of the two proposals.
3. If necessary, on May 22nd hold interviews or request written responses to questions from the two organizations with proposals under consideration for funding.
4. We anticipate reaching a decision and notifying all responding organizations of our intent to award funding by Friday, May 23rd.
5. Staff will bring the resulting recommendations and/or contracts to the Commission for approval at its June 23rd meeting.

ECMH Direct Services: \$ 2,100,000 over three years: Presentation Prior to Approval Item

Recommendation by F5SMC Staff and Proposal Review Panel to Commission for Approval of Awards, Contract Negotiations and Contract Execution to support Early Childhood Mental Health Services, Contractual Term effective July 1, 2025 through June 30, 2028 Recommendation and Approval at today's Commission meeting. (Agenda item #7)

CONSIDERATIONS

- Staff research and advocate for other grant revenue to augment local F5SMC Community Investments. Some strategies and domains have outside funding opportunities, and some do not. Updates to the Commission on leveraged funding opportunities or other grant revenue is ongoing.
- In order to provide continuity of care and staffing stability for currently funded activities and staff, contracts that fund existing service strategies must be in place no later than July 1, 2025.

ACTION REQUESTED

No action required. Presentation and Update: Strategic Plan Implementation Plan (SPIP) Procurement Process for FY2025 – 2028 and Resilient Families Focus Area: Family Connectivity & Leadership and Early Childhood Mental Health Services (Round 1)



May 14, 2025

2025-2028 Strategic Plan Implementation Plan Long-Term Financial Community Investments

STRATEGIES

1. System Navigation and Care Coordination for Families:

To support families with equitable access to the services they need to support their child's positive and healthy development, F5SMC will advance system building efforts that help families navigate systems, resources, and services, and promote stronger service coordination, care coordination, and case management for families with complex needs. This will be done in coordination with other funding partners and systems to achieve the highest impact.

2. Capacity and Network Building for Child-Serving Systems and Providers:

To strengthen child- and family-serving systems to deliver high-quality services to children and families, F5SMC will drive efforts that build and strengthen organizational and workforce capacity, promote workforce retention, break down silos, and increase cross-collaboration. This will be done in coordination with other funding partners and systems to achieve the highest impact.

3. Weaving Partnerships and Innovative Initiatives for Transformational Change:

To fundamentally change the systems that impact the wellbeing and lifelong trajectories of children prenatal to five, F5SMC will lead efforts that weave together cross-sector partnerships, amplify family voices, transform mental models, and practice the vision of the future that we are seeking to build for our county's youngest children. This will be done in coordination with other funding partners and systems to achieve the highest impact.

4. Family Connectivity and Leadership:

To strengthen the connections, relationships, and power that make up a supportive and holistic ecosystem of care for families of young children, F5SMC will support parent connection and community-building efforts that reduce social isolation of families and empower caregivers with the relationships, knowledge, leadership skills, and tools to support their child's positive and healthy development and to advocate for their child. These parent connectivity and leadership efforts may focus on positive mental health of caregivers of young children prenatal to five, positive caregiving, quality early learning, healthy development, family advocacy and leadership building, or protective factors for children. This will be done in coordination with other funding partners and systems to achieve the highest impact.

5. Policy, Advocacy, and Community Education:

To cultivate a child-centered culture where children lead the way in San Mateo County, F5SMC will lead strategic policy, advocacy, communications, and research and knowledge development to build public and political will to invest in the well-being and success of our young children and give stakeholders the information they need to change the systemic conditions for children and families. This includes developing and implementing a new Communications Plan that supports increasing understanding about foundational early childhood topics such as early brain development. This will be done in coordination with other partners and leaders to achieve the highest impact.

Funding the SPIP:

The following SPIP outlines how F5SMC intends to allocate local Prop. 10 funds through community investments over the next three years (2025-2028), in alignment with the Strategic Plan framework. On average is 30% reduction in funding for the SPIP and LTTP. Allocations are organized by the domain areas that are impacted, followed by the specific strategies that will be funded, and the detailed focus of the procurement.

The 3-year allocation amounts are solely F5SMC Prop. 10 funds, and do not include any leveraged funding primarily resourced from non-Prop 10 dollars. For some strategies, leveraged funding are secured or in process to compliment F5SMC; These funding opportunities will be informed at the time of procurement approval and or when possible.

2025 - 2028 Strategic Plan Implementation Plan



Healthy Children

Secondary Domain Areas Impacted: Systems Change

	<i>Strategic Plan Strategies to Be Funded</i>	<i>Focus of Procurement Process Including but not limited to</i>	<i>Total F5SMC Dollars Allocated (2025-2028)*</i>
#1	Capacity & Network Building; Weaving Initiatives for Transformational Change	Oral Health Systems Support for collaboration and administration of countywide oral health efforts	\$ 210,000

Secondary Domain Areas Impacted: Resilient Families, Systems Change

#2	System Navigation & Care Coordination; Capacity & Network Building; Weaving Initiatives for Transformational Change; Family Connectivity & Leadership	Systems and Supports for Children with Special Needs <ul style="list-style-type: none"> • Care Coordination • Developmental Screenings • Developmental Playgroups • Provider training and technical assistance • Systems improvement: 	\$ 1,800,000
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Quality Care and Education

Secondary Domain Areas Impacted: Systems Change

	<i>Strategic Plan Strategies to Be Funded</i>	<i>Focus of Procurement Process Including but not limited to</i>	<i>Total F5SMC Dollars Allocated (2025-2028)*</i>
#3	System Navigation & Care Coordination; Capacity & Network Building; Weaving Initiatives for Transformational Change; Family Connectivity & Leadership	Quality Early Learning <ul style="list-style-type: none"> • Coaching • Provider professional development and workforce development stipends • Provider training & professional development • Quality Improvement Supports in FCC's and alternative settings • Support for collaboration administration of county-wide quality efforts 	\$ 1,500,000

#4	Policy, Advocacy & Community Education; Weaving Initiatives for Transformational Change	Child Care Facilities <ul style="list-style-type: none"> • Leadership for coordinating & coalescing countywide childcare facility efforts • Growing and Preserving Child Care spaces • Policy & Advocacy 	\$ 300,000
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Resilient Families

Secondary Domain Areas Impacted: Systems Change

	<i>Strategic Plan Strategies to Be Funded</i>	<i>Focus of Procurement Process Including but not limited to</i>	<i>Total F5SMC Dollars Allocated (2025-2028)*</i>
#5	Capacity & Network Building; Weaving Initiatives for Transformational Change	Capacity & Network Building for Family Engagement Professionals <ul style="list-style-type: none"> • Friday CAFEs • Communities of Practice 	\$225,000**** (See #10)

Secondary Domain Areas Impacted: Systems Change, Healthy Children, Quality Care and Education

#6	Family Connectivity & Leadership Round 1, May 19, 2025.	Family Connectivity & Leadership <ul style="list-style-type: none"> • Parent advocacy training and support • Parent Cafes • Parent support groups • Parent-child groups • Support for parent-led community building activities 	\$ 225,000
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Secondary Domain Areas Impacted: Healthy Children, Quality Care and Education

#7	System Navigation & Care Coordination; Weaving Initiatives for Transformational Change; Family Connectivity & Leadership Round 1, May19, 2025.	ECMH Direct Services & Systems Building <ul style="list-style-type: none"> • Care Coordination & System Navigation Support • Parent Support Groups • Parent-Child groups • Child-Parent Psychotherapy • Developmental, behavioral, and mental health support and intervention in early care and education settings (e.g. ECMH Consultation, Occupational Therapy, reflective supervision, provider training & TA) 	\$ 1,788,000***
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Systems Change

Secondary Domain Areas Impacted:

	<i>Strategic Plan Strategies to Be Funded</i>	<i>Focus of Procurement Process Including but not limited to</i>	<i>Total F5SMC Dollars Allocated (2025-2028)*</i>
#8	Capacity & Network Building	Trauma & Resiliency Informed Systems Initiative <ul style="list-style-type: none"> • Coaching • Provider training and technical assistance • Trauma Informed Organizational Assessment administration • TRISI Evaluation 	\$ 150,000

Secondary Domain Areas Impacted: Healthy Children

#9	Weaving Initiatives for Transformational Change; Capacity & Network Building; Family Connectivity & Leadership	ECMH Provider Training and Network Building <ul style="list-style-type: none"> • CPP Training • Provider training and TA • Provider Network • ECMH 101 • Reflective Supervision Training 	\$ 75,000
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Secondary Domain Areas Impacted: Healthy Children, Resilient Families

#10	Capacity & Network Building; Weaving Initiatives for Transformational Change	Home Visiting Systems Support <ul style="list-style-type: none"> • Enhance Existing Resource & Referrals Hub • Online Professional Development Resources 	\$ 195,000**** (Strategy #10 is folded into Strategy #5 bringing the combined total to \$420,000*)
#11	Policy, Advocacy & Community Education	Kits for New Parents <ul style="list-style-type: none"> • Resource and Information for babies & their families • SMC specific customization 	\$ 71,500

Secondary Domain Areas Impacted: All Domains

#12	Policy, Advocacy & Community Education	Emerging Issues and Innovations <ul style="list-style-type: none"> • Supports strategic plan strategies & domains 	\$ 276,500
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Secondary Domain Areas Impacted: Healthy Children, Quality Care and Education, Resilient Families

#13	Policy, Advocacy & Community Education	Communications <ul style="list-style-type: none"> • General Implementation of communications plan • Play and Social Opportunities Hub • Oral Health communications • Special Initiatives communications 	\$ 435,000
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#14	Policy, Advocacy & Community Education COMPLETED	Grants Management System <ul style="list-style-type: none"> • Data system for reporting and invoicing 	\$ 294,000
#15	Policy, Advocacy & Community Education	Evaluation <ul style="list-style-type: none"> • Client-level and aggregate data per Prop 10 statute • Systems evaluation • Other research projects 	\$ 255,000
TOTAL F5SMC COMMUNITY INVESTMENTS ALLOCATION (2025-2028)			\$7,800,000**

* Does not include secured or unsecured leveraged funding

** Does not include the Commission approved \$650,000 SPIP FY 23-25 Carry Over Reallocation to SPIP 2025-2030.

*** Lesser portion of funding for Early Childhood Mental Health Consultation which will be procured through a separate process.

**** Strategy #10 and # 5 will be combined bringing the combined total to \$420,000. Does not include possible leveraged funding.



Comparisons of Procurement Strategies (Adapted)

Note: This is based on a strict interpretation on procurement types. However, in practice, many funders don't distinguish between an RFP and an RFA. There are many different ways that procurement can be modified and this should not be seen as "right" or "wrong." In addition, a required or optional Intent to Participate may be used as a precursor for any type of procurement.

Procurement Type	Key Characteristics	Typically Used For
Request for Application (RFA)	<ul style="list-style-type: none"> • Defined desired outcomes and <i>strategies</i> • Defined budget for which the applicant delineates staffing structure/costs to deliver the specified strategies • Typically has prescribed data and evaluation expectations 	<ul style="list-style-type: none"> • Use when you know what you want to achieve and which strategies will take you there. Looking for best applicant/s that can deliver within the allowed budget.
Request for Proposal (RFP)	<ul style="list-style-type: none"> • Defined outcomes • Applicant "proposes" strategies to meet outcomes • Budget range typically defined for which the applicant proposes staffing structure/costs to deliver vendors proposed strategies • Some data elements may be defined but typically proposer suggests evaluation plan along with strategies 	<ul style="list-style-type: none"> • Use when you know what outcomes you want to achieve and are <i>flexible</i> about which strategies will best meet those outcomes.
Request for Qualifications (RFQ)	<ul style="list-style-type: none"> • Qualifications to produce services or product are clear • Vendor is selected on their qualifications and experience in delivering comparable services or products • There is not a detailed proposal at the service or strategy level, but they may give examples of previous work to back-up their qualifications • Budget limit may or may not be defined • Candidates typically give hourly or deliverable rates 	<ul style="list-style-type: none"> • Use when you need to procure a specific skill set or product where the qualifications to deliver are clear (strategic planning, evaluation services, training/coaching, data system, etc.) • detailed SOW/work plan of project often determined during or after initial contracting
Intent to Negotiate/ Partner (ITN/P)	<ul style="list-style-type: none"> • Collaborative grantmaking where staff and vendors work together throughout the entire procurement; typically includes multiple working meetings 	<ul style="list-style-type: none"> • Use when an open community process will result in a better program model • Use when it is in the Commission's interest to have staff involved in all details of development



	<ul style="list-style-type: none"> • May be used with numerous vendors at the same time or as sole source • Desired outcomes are usually clear • Goal is usually a coordinated effort that involves multiple parties • Strategies may or may not be loosely pre-defined • Typically looking for community input for design details and vendors • Budget limit may or may not be defined 	<ul style="list-style-type: none"> • Use when looking to develop a coordinated structure with multiple community partners
Sole Source	<ul style="list-style-type: none"> • Non-competitive process • Requires a rationale be fully justified in writing and approved by the Commission • Desired outcomes are clearly defined • Budget limit may or may not be defined 	<ul style="list-style-type: none"> • Use when there is only one viable provider of the required service, competition is determined to be inadequate after solicitation from a number of sources, or the Commission is contemplating an effort that has not been done before • Use when the contractor is familiar with the Commission and is knowledgeable of its unique needs • The contract is below a threshold determined by the Commission

Appeal Process

A Proposer must submit a written appeal via email by midnight, of date indicated in the RFP to the attention of the Executive Director of F5SMC and copied to the Program and contract staff as indicated below. Appeals may be written in the body of the email itself or sent as an attachment to the email.

Appeals shall be emailed to: Kitty Lopez, Executive Director, F5SMC at klopez@smcgov.org and copied to staff indicated in the RFP.

Mailed or hand-delivered appeals will not be accepted.

Appeals shall be submitted as stated above and shall be limited to the following grounds:

1. Any failure of F5SMC to follow RFP procedures as articulated in the RFP; and/or
2. The RFP review criteria were not appropriately applied to the proposal.

The Proposer must include a statement of explanation in the appeal letter describing the specific reasons that form the basis of the appeal.

The Executive Director of F5SMC will respond in writing to the appeal within 10 calendar days of the receipt of the written appeal. F5SMC staff may establish a meeting with the Proposer in order to discuss the concerns. The decision of the Executive Director of F5SMC is final.

If the proposer fails to follow any of the instructions set forth in the RFP, Proposer will waive the right to file an appeal with the Commission.

DATE: May 19, 2025

TO: First 5 San Mateo County Commission

FROM: Kitty Lopez, Executive Director

RE: Recommendation by F5SMC Staff and Proposal Review Panel to Commission for Approval of Awards totaling \$2,100,000 to support Early Childhood Mental Health Services, with proposed terms of July 1, 2025 through June 30, 2028 and direction to Staff to Conduct Contract Negotiations with up to 5% Variance and Contract Execution Regarding Same for the Following Agencies:

- a) Ayudando Latinos A Sonar (ALAS) for a total amount of \$600,000
- b) Community Overcoming Relationship Abuse (CORA) for a total amount of \$600,000
- c) One Life Counseling Center for a total amount of \$600,000
- d) Peninsula Family Connections for a total amount of \$150,000
- e) Puente de la Costa Sur for a total amount of \$150,000

ACTION REQUESTED

Recommendation by F5SMC Staff and Proposal Review Panel to Commission for Approval of Awards totaling \$2,100,000 to support Early Childhood Mental Health Services, with proposed terms of July 1, 2025 through June 30, 2028 and direction to Staff to Conduct Contract Negotiations with up to 5% Variance and Contract Execution Regarding Same for the Following Agencies:

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- d) Peninsula Family Connections for a total amount of \$150,000
- e) Puente de la Costa Sur for a total amount of \$150,000

BACKGROUND

F5SMC 2025-2030 Strategic Plan and Implementation Plan:

At its December 2024 and January 2025 meetings, the Commission adopted its 2025-2030 Strategic Plan and approved the LTFP and the Strategic Plan Implementation Plan (**SPIP— See Attachment 6 and 6.1**). At the same time the Commission authorized staff to conduct the procurement processes associated with all investment strategies within the SPIP, including the awards under consideration at this meeting.

The Long-Term Financial Plan involves two funding phases: Phase One is a three- year period from July 1, 2025 to June 30, 2028; and Phase Two is a two-year period from July 1, 2028 to June 30, 2030. The SPIP and the following funding recommendations apply to Phase One only.

Early Childhood Mental Health Service Request for Proposals:

F5SMC released the ECMH Services RFP on April 7, which specified the following Areas of Interest and Target Populations:

Areas of Interest: Demonstrated ability to design and implement specific approaches and services including but not limited to the following areas:

- Parent-child groups focused on mental or behavioral health,

- Parent support groups led or co-led by clinicians,
- Therapeutic/clinical services including Child-Parent Psychotherapy and other dyadic approaches,
- Sensory regulation/ integration services,
- Other services

Proposed strategies must be evidence-based, evidence-informed, or emerging/promising practices.

Target Populations: F5SMC prioritizes services and approaches that focus on serving the following target populations:

- Children from birth through age 5 and their caregivers who may have experienced trauma including but not limited to homelessness/housing insecurity or intimate partner violence,
- Families/caregivers of children ages 0-5 who may be experiencing mental health challenges, isolation, a lack of informal supports, and/or lack of access to services,
- Children birth through age 5 and their families that are Medi-Cal eligible, as well as those who do not meet economic self-sufficiency in San Mateo County,
- Culturally, linguistically, and/or geographically isolated families.

Procurement Process: The funding mechanism used to develop this recommendation was a Request for Proposals (RFP) process. A document provided by VIVA Social Impact Partners comparing various procurement processes is attached (**See Attachment 6.2**)

The RFP process included vetting of proposals with a panel of external experts and F5SMC staff knowledgeable about the field of early childhood mental health. The review panel conducted in-depth discussions about the submissions and used a standard rating rubric to arrive at final recommendations.

RECOMMENDATION FOR FUNDING

The attached table (**ATTACHMENT 7.1**) summarizes today's three-year funding recommendation for the five agencies recommended by the Review Panel through the Early Childhood Mental Health Services RFP process.

CONSIDERATIONS

- **Timeliness:** F5SMC-funded early childhood mental health service providers require advanced notice to ramp up or wind down critical services. Approving these recommendations during the May Commission meeting is critical to allow for any current F5SMC grantees who will no longer receive funding adequate time to transition clients as needed. The recommended contracts should begin no later than July 1, 2025 to minimize service disruption for those agencies that are current grantees recommended for ongoing funding.
- **Contract Negotiations:** F5SMC reserves the right to negotiate specific elements of the recommended proposals as a part of the contract negotiations process. Therefore, the 3-year funding amount, target population, key service strategies, and proposed annual service numbers are all subject to minimal refinement as a result as necessary. F5SMC staff will update the Commission with any changes determined through this process.
- **Variance:** The cumulative amount of the five recommended awards over the three-year term totals \$2,100,000. However, F5SMC reserves the right to shift up to 5% of the total amount between the five recommended agencies as determined through contract negotiations without exceeding the total amount of \$2,100,000 as deemed necessary to support any nuances in service delivery agreed upon through this process.

- Appeals Process: Recommendations made by the Commission will accommodate the published appeal process and timeline. Appeals for this RFP process are due by May 21, 2025. Contract negotiations will begin only after the appeals process has concluded. **(SEE ATTACHMENT 6.3).**

FISCAL IMPACT

The total amount of \$2,100,000 recommended to award over the three-year term includes a \$500,000 contribution of Mental Health Services Act funding in the first fiscal year. The remaining \$1,600,000 recommended to award is F5SMC Prop 10 funding. This amount is in accordance with the approved funding allocations of the SPIP and the LTFP. Please note that the SPIP allocation of \$1,788,000 for ECMH Direct Services and Systems Building also includes a lesser portion of funding for Early Childhood Mental Health Consultation which will be procured through a separate process.

RECOMMENDATION

Recommendation by F5SMC Staff and Proposal Review Panel to Commission for Approval of Awards totaling \$2,100,000 to support Early Childhood Mental Health Services, with proposed terms of July 1, 2025 through June 30, 2028 and direction to Staff to Conduct Contract Negotiations with up to 5% Variance and Contract Execution Regarding Same for the Following Agencies:

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- e) Puente de la Costa Sur for a total amount of \$150,000

SPIP FY 2025-2028 FUNDING RECOMMENDATIONS – EARLY CHILDHOOD MENTAL HEALTH DIRECT SERVICES

	Program	Approximate 3-year Funding Amount	Target Population	Key Service Strategies	Proposed Approximate Annual Service Numbers	Highlights
a) Ayudando Latinos a Sonar (ALAS)	Colibri Child Wellness Program	\$600,000	The Latino community residing in the Coastside region of San Mateo County, which predominantly consists of farmworkers and their families.	<ul style="list-style-type: none"> - Parent-child groups - Parent support groups - Therapeutic/clinical services (Child-Parent Psychotherapy and other dyadic approaches) - Other services: Developmental screenings, training in evidence-based trauma-informed psychotherapy. 	150 unduplicated clients; 80 parents, 30 children ages 0-2, and 40 children ages 3-5. Training for 3 providers.	<ul style="list-style-type: none"> - Strong program design that supports triage into and between services - Ability to serve remote locations with the ALAS Equity Express Bus - Embedded within the context of ALAS' other culturally specific programs and deep trust built within the target community
b) Community Overcoming Relationship Abuse (CORA)	Zero to Five Family Centered Mental Health Program	\$600,000	Single parents with children ages 0-5 who have experienced domestic violence based in San Mateo County.	<ul style="list-style-type: none"> - Therapeutic/clinical services (Child-Parent Psychotherapy and other dyadic approaches) - Parent support groups 	65 unduplicated clients. Includes 30 parents, 35 children.	<ul style="list-style-type: none"> - Critically important target population to address trauma for children/ caregivers with intensive, evidence-based therapeutic services - Utilizing strong suite of clinical tools to support clients
c) One Life Counseling Center	N/A	\$600,000	Those who are under-resourced with limited access to health care, mental health support. Target is 60% Medi-Cal, 35% Un/underinsured, and 5% other in Redwood City, East Palo Alto, South San	<ul style="list-style-type: none"> - Parent support groups - Therapeutic/clinical services (Child-Parent Psychotherapy and other dyadic approaches) - Sensory regulation/ integration services 	600 unduplicated clients; 250 parents/ caregivers, 150 children ages 0-2, 200 children ages 3-5.	<ul style="list-style-type: none"> - Varied service delivery offerings to support a range of early childhood mental health needs - Progressive model for billing and referrals, available across incomes and insurance - Broad service delivery catchment area, embedded

SPIP FY 2025-2028 FUNDING RECOMMENDATIONS – EARLY CHILDHOOD MENTAL HEALTH DIRECT SERVICES

			Francisco, San Mateo, Daly City.			across the county and in school-based settings
d) Peninsula Family Connections	N/A	\$150,000	Under-resourced, low-income families from East Palo Alto, North Fair Oaks, Redwood City, and Daly City.	<ul style="list-style-type: none"> - Parent Child Groups - Parent Support Groups - Therapeutic/clinical services (short-term counseling, other dyadic approaches) - Other services: Administration of mental health screening tools 	70 unduplicated clients; 35 parents and 35 children. Up to 90 families screened with mental health tools.	<ul style="list-style-type: none"> - Co-location of mental health service offerings within a trusted, family-centered early childhood education setting with broad geographic reach - Strong range of mental health service offerings provided by highly qualified staff
e) Puente de la Costa Sur	N/A	\$150,000	Primarily low-income Latino families with young children in the South Coast towns of Pescadero, La Honda, Loma Mar, and San Gregorio.	<ul style="list-style-type: none"> -Parent Child Groups -Parent Support Groups 	32 unduplicated clients; 22 parents and 10 children.	<ul style="list-style-type: none"> - Great range of culturally centered group-focused service offerings - Serves a targeted, geographically isolated community through a trusted core agency
Total		\$2,100,000			917 unduplicated individuals; 417 parents/caregivers, 500 children	

DATE: May 19, 2025

TO: First 5 San Mateo County Commission

FROM: Kitty Lopez, Executive Director

RE: Approval of the First 5 San Mateo County Policies and Bylaws for FY 2025-26

ACTION REQUESTED

Approval of the First 5 San Mateo County Policies and Bylaws for FY 2025-26

BACKGROUND

Mandate Policies: The First 5 San Mateo County (F5SMC) Commission annually reviews and approves the Commission's policies to ensure compliance with legislative mandates and other administrative processes and to strengthen F5SMC's internal controls for operations. Currently, there are seven (7) policies, four (4) of which are in direct response to the mandates outlined in the 2006 Assembly Bill 109 (Chan) and 2006 Senate Bill 35 (Florez). These four policies include: Contracting and Procurement, Conflict of Interest, Salary and Benefits, and Administrative Costs. All seven (7) policies were reviewed and approved by the Commission on May 20, 2024.

Bylaws: On May 22, 2023, the Commission reviewed and approved First 5 San Mateo County's Amended Bylaws May 2023.

UNCHANGED POLICIES

The following policies remain unchanged:

- Amended Contracting and Procurement Policy May 2023 (Attachment 8A)
- Conflict of Interest Policy (Attachment 8B)
- Salary and Benefits Policy (Attachment 8C)
- Administrative Costs Policy (Attachment 8D)
- Supplantation Policy (Attachment 8E)
- Delegation of Authority to Executive Director to Take Action to Support or Oppose Legislation or Other Initiatives (Attachment 8F)
- Amended Event Sponsorship Policy (Attachment 8G)

CHANGED POLICIES:

- Amended Bylaws May 2025 (Attachment 8H)
Amended: Added #7 of Article VIII

ARTICLE VIII

7. Attendance:

The Commission expects its members to attend Commission meetings regularly and consistently. Commission members should notify the First 5 Operation Coordinator of any planned absences, at least 48 hours in advance, unless unforeseen emergencies occur. If a Commission Member has more than three (3) unexcused absences at

Board meetings or three (3) unexcused absences at Standing Committee meetings, the Commission Chair will direct staff to notify the subject Commission member with the intention of resolving the participation issue. If there is a further unexcused absence by the Commission member the Commission Chair and the Executive Director will request that the Commission member step down and staff will work to designate a replacement. Unexcused absence is defined as not having provided written notification prior to the meeting.

FISCAL IMPACT

None

RECOMMENDATION

Approval of the First 5 San Mateo County Policies and Bylaws for FY 2025-26.



SUBJECT: AMENDED CONTRACTING AND PROCUREMENT POLICY (May 2023)

PURPOSE: To facilitate compliance with Health and Safety Code Section 130140(d)(4)(B) requiring the county commission to adopt, in a public hearing, a contract and procurement policy that is consistent with certain state law provisions. And, to comply with Health and Safety Code Section §130151(b)(1), which requires that the contract and procurement policy contains provisions to ensure that grants and contracts are consistent with the commission's strategic plan.

To facilitate compliance with the Standards and Procedures for Audits of California Counties participating in the California Children and Families Program issued by the California State Controller, March 2006.

Part I. STATEMENT OF POLICIES

The First 5 San Mateo County Commission ("First 5 San Mateo County" or the "Commission") and staff will comply with State law in all matters regarding Commission contracting and procurement to the extent applicable to the Commission, including ensuring that contracting and procurement are consistent with Article 7 (commencing with Section 54201) of Chapter 5 of Part 1 of Division 2 of Title 5 of the Government Code, Chapter 2 (commencing with Section 2000) of Part 1 of Division 2 of the Public Contract Code, Section 3410 of the Public Contract Code, and Chapter 3.5 (commencing with Section 22150) of Part 3 of Division 2 of the Public Contract Code.

When purchasing food, First 5 San Mateo County will give preference to United States-grown produce and United States processed foods when there is a choice and it is economically feasible to do so.

If fitness and quality are equal, First 5 San Mateo County will purchase recycled products, as defined in Section 12200 of the Public Contract Code, instead of non-recycled products whenever recycled products are available at the same or a lesser total cost than non-recycled items.

In accordance with Section 130140 and Section 130105 of the Health and Safety Code, First 5 San Mateo County has autonomy to expend moneys from the trust fund only for the purposes as described in the Commission's approved Strategic Plan.

Part II. CONTRACTING & GRANT PROCESSES

A. First 5 San Mateo County shall use a competitive selection, negotiation and approval process ("Request for Proposal Process" or "RFP Process") whereby potential contractors and/or grantees may submit applications for Commission funding. Use of the RFP Process is intended to ensure that

all qualified contractors and/or grantees are given an opportunity to be considered a service provider to the Commission.

No person shall be excluded from participation in, denied benefits of, or be subject to discrimination under this process on the basis of their race, color, religion, national origin, age, sex, sexual orientation, pregnancy, childbirth or related conditions, medical condition, mental or physical disability or veteran's status. The RFP Process may only be waived by the Commission upon a finding that it would be in the best interests of the Commission.

- B. In addition to particular criteria are important and appropriate to the project/grant, the criteria for choosing the contractor and/or grantee may include and may include:
- Experience of the agency and specific staff assigned to complete the work, including description of experience with similar projects
 - Proposed methodology, work plan and timeline to complete the scope of work
 - Proposed cost to complete the work
 - Payment terms (when payment is due to the contractor and/or grantee throughout the timeframe of the contract)
 - Start date and completion date of the work/service.

Once the Commission has selected the contractor(s) and/or grantee(s) that can best perform the necessary work, Commission staff will negotiate the terms of the contract in accordance with the Commission's approval for such services.

- C. The Commission shall approve and execute all service agreements, memorandums of understanding, and/or contracts with a total obligation amount that exceeds \$100,000. Any related contract amendment that brings the Contract's not to exceed amount to \$100,000 or greater shall also be approved and executed by the Commission in advance of execution of the agreement.
- D. The Executive Director of First 5 San Mateo County is authorized to approve and execute service agreements, memorandums of understanding and/or contracts with a total obligation amount less than or equal to \$25,000. The Executive Director has signature authority to approve all service agreements, memorandums of understanding, and/or contracts with a total obligation amount between \$25,001 and \$100,000 on behalf of the Commission. In the event of an emergency in which the Executive Director is unable to sign and execute service agreements, memorandums of understanding and/or contracts, the Deputy Director will have signature authority, after consultation with the Commission Chair.
- E. Any service agreements, memorandums of understanding, and/or contracts that do not use or otherwise substantively amend the standard San Mateo County template agreement will be reviewed by County

Counsel. Approval must be obtained by County Counsel prior to finalization.



SUBJECT: CONFLICT OF INTEREST POLICY

PURPOSE: To facilitate compliance with Health and Safety Code Section 130140(d)(4)(A) requiring the county commission to adopt, in a public hearing, a policy consistent with state and local law regarding conflict of interest of the commission members.

To facilitate compliance with the Standards and Procedures for Audits of California Counties participating in the California Children and Families Program issued by the California State Controller, March 2006.

PART I. CONFLICT OF INTEREST CODE – GOVERNMENT CODE SECTION 87100

- A. The First 5 San Mateo County Commission (“First 5 San Mateo County” or the “Commission”) has a Conflict of Interest Code, which has been approved by the San Mateo County Board of Supervisors. Pursuant to Section 87306.5 of the Government Code, First 5 San Mateo County will review that Conflict of Interest Code biennially. First 5 San Mateo County has designated the following positions in its Code: Commissioners, Executive Director, Deputy Director, and Consultants (when applicable).
- B. Form 700 filing. All individuals holding positions designated by the Conflict of Interest Code shall file the Form 700 of the California Fair Political Practices Commission, when assuming office, annually thereafter, and when leaving office as required by regulation.
- C. The Commission shall continue to have a conflict of interest code in effect at all times.

PART II. GOVERNMENT CODE SECTION 1090, *et seq.*

First 5 San Mateo County shall continue to conduct its business at all regular and special meetings of the Commission in accordance with the provisions of Government Code sections 1090, *et seq.*, hereby incorporated by reference.

Pursuant to Section 1091.3 of the Government Code, First 5 San Mateo County Commissioners will recuse themselves from making, participating in making, or in any way attempting to use their official position to influence a decision on an agreement when the agreement directly relates to services to be provided by the member or the entity the member represents or financially benefits the member or the entity the member represents.

PART III. GOVERNMENT CODE SECTION 1125, et seq. (INCOMPATIBLE ACTIVITIES)

The Commission shall continue to conduct its operations consistent with Government Code Section 1125, *et seq.* Except as provided in Sections 1128 and 1129 of the Government Code, First 5 San Mateo County officers and employees shall not engage in any employment, activity, or enterprise for compensation which is inconsistent, incompatible, in conflict with, or inimical to their duties as a First 5 San Mateo County Commission officer or employee or with the duties, functions, or responsibilities of their appointing power or the agency by which they are employed.

First 5 San Mateo County officers and employees shall not engage in any outside employment, activity, or enterprise if it: (1) involves the use for private gain or advantage of First 5 San Mateo County time, facilities, equipment and supplies; or the badge, uniform, prestige, or influence of First 5 San Mateo County office or employment or, (2) involves receipt or acceptance by the officer or employee of any money or other consideration from anyone other than First 5 San Mateo County for the performance of an act which the officer or employee, if not performing such act, would be required or expected to render in the regular course or hours of First 5 San Mateo County employment or as a part of his or her duties as a First 5 San Mateo County officer or employee or, (3) involves the performance of an act in other than his or her capacity as a First 5 San Mateo County officer or employee which act may later be subject directly or indirectly to the control, inspection, review, audit, or enforcement of any other officer or employee or the agency by which he or she is employed, or (4) involves the time demands as would render performance of his or her duties as a First 5 San Mateo County officer or employee less efficient.

Further, the incompatibility rules of the County of San Mateo, particularly the provisions of Section 2.75.060 of the Ordinance Code of the County of San Mateo, shall be, and are hereby adopted as the rules applicable to the First 5 San Mateo County Commissioners.

Further, each employee and officer of the Commission will be provided a copy of this policy. Engaging in incompatible activities will subject employees and officers to disciplinary action, up to and including termination or removal from the Commission (whichever is applicable). Any disciplinary action related to violation of this policy will be conducted in accordance with the Commission's general disciplinary processes, which provide the ability to contest imposition of discipline.

PART IV REPORTING A CONFLICT OF INTEREST

When a Commissioner first becomes aware of a conflict of interest or potential conflict of interest regarding a matter before the Commission or Committee, he or she must notify First 5 San Mateo County's legal counsel, the Executive Director and the chairperson of the Commission or the Committee. The facts of the conflict of interest will be recorded in the minutes of the Commission or Committee meeting.

First 5 San Mateo County

List of Designated Positions in the First 5 San Mateo County and Financial Disclosure Categories

Each person holding any position listed below must file statements disclosing the kinds of financial interest shown for the designated employee's position. Statements must be filed at the times and on the forms prescribed by law. Failure to file statements on time may result in penalties including but not limited to late fines.

<u>Designated Employees</u>	<u>Disclosure Category</u>
Commission Member	1,2,3,4
Executive Director	1,2,3,4
Deputy Director	1,2,3,4
Consultants*	1,2,3,4

*The Executive Director, after consultation with the County Counsel, shall review the duties and authority of all consultants retained by the Commission. Those consultants who, within the meaning of Section 18700 (a)(2) of Title 2 of the California Code of Regulations are required to file statements of economic interests, shall do so. During each calendar year, First 5 San Mateo County shall maintain a list of such consultants for public inspection in the same manner and location as this Conflict of Interest Code. Nothing herein excuses any consultant from any other provision of the Conflict of Interest Code, specifically those dealing with disqualification.

Disclosure Categories

Category 1. A designated official or employee assigned to category 1 is required to disclose direct or indirect investments in any business entity that may foreseeably be affected materially by any decision made or participated in by the designated official or employee by virtue of his or her position.

Category 2. A designated official or employee assigned to category 2 is required to disclose interests in any real property that may foreseeably be affected materially by any decision made or participated in by the designated official or employee by virtue of his or her position.

Category 3. A designated official or employee assigned to category 3 is required to disclose any source of income that may foreseeably be affected materially by any decision made or participated in by the designated official or employee by virtue of his or her position.

Category 4. A designated official or employee assigned to category 4 is required to disclose any business entity in which the designated official or employee is a director, officer, partner, trustee, employee or holds any position of management that may foreseeably be affected materially by any decision made or participated in by the designated official or employee by virtue of his or her position



SUBJECT: **SALARY AND BENEFITS POLICY**

PURPOSE: To facilitate compliance with Health and Safety Code Section 130140(d)(6) requiring the county commission to adopt, in a public hearing, policies and processes establishing the salaries and benefits of employees of the county commission.

To facilitate compliance with the Standards and Procedures for Audits of California Counties Participating in the California Children and Families Program issued by the California State Controller, March 2006.

I. **STATEMENT OF POLICY**

As required by Health and Safety Code Section 130140(d)(6), salaries and benefits shall conform with established First 5 San Mateo County Commission and San Mateo County government policies.

II. **SALARY AND BENEFITS POLICIES AND PROCESSES**

The San Mateo County Board of Supervisors created the First 5 San Mateo County Commission in March 1999, Ordinance No. 3889. As an agency of the County, the First 5 San Mateo County Commission complies with the salaries and benefits policies and procedures that are applicable to all Boards and Commissions in the County, including:

- The Memorandum of Understanding between County of San Mateo and the applicable union that establishes the salaries for each job classification, as may be amended from time to time; and
- County Resolutions that provide salaries and related matters for exempt management, confidential and other unrepresented employees, as may be amended from time to time.

Employee hiring, termination, payroll, pay increases and benefits are processed through the San Mateo County Employee and Personnel Services Department and the Controller's Office.



SUBJECT: ADMINISTRATIVE COSTS POLICY (Amended)

- Categorizing Administrative costs, Program costs, and Evaluation costs
- Defining Administrative costs.
- Determining the maximum allowable Administration costs as a percentage of the commission's total operating budget.
- Monitoring the Administrative cost percentage to ensure the actual Administrative costs do not exceed the maximum rate adopted by the commission.

PURPOSE: To facilitate compliance with Health and Safety Code Section 130140(d)(5) requiring the county commission to adopt, in a public hearing, a limit on the percentage of the county commission's operating budget that may be spent on administrative functions.

To facilitate compliance with the Standards and Procedures for Audits of California Counties Participating in the California Children and Families Program issued by the California State Controller, March 2006.

I. STATEMENT OF POLICY

First 5 San Mateo County will consistently identify Administrative costs following the guidelines outlined in this policy and monitor the actual Administrative costs as a percentage of its annual operating budget.

II. COST CATEGORIES

All costs fall into one of three major categories: Administrative, Program, or Evaluation. Administrative costs are differentiated from Program costs and Evaluation costs in accordance with the guidelines provided through the *Financial Management Guide*¹ of First 5 Association of California; its *Cost Allocation and Administrative Cost*² provide guidelines in categorizing and allocating costs.

III. ADMINISTRATIVE COST DEFINITION

¹ The Guide is a product of the California First 5 Association's and the State Commission's joint technical assistance effort and a direct result of a financial management assessment conducted by the Government Finance Officers Association (GFOA) in response to new legislation.

² Financial Management Guide, First 5 Association of California (the Fifth Edition, 2015) Cost Allocation (pages 36-37); Administrative Cost, (page 61-65)

Administrative costs: Costs incurred in support of the general management and administration of a First 5 Commission, for a common or joint purpose that benefits more than one cost objective (other than Evaluation and Program activities), and/or those costs not readily assignable to a specifically benefited cost objective.

Administrative costs include all salaries, benefits, services, and supply costs not readily identifiable as costs of the Commission's Evaluation or Program activities. Commission staff will adhere to the above definition for budgeting, accounting, and financial reporting processes. Staff utilizes certain codes for reporting processes to identify costs as Program, Evaluation, or Administration according to their nature. Except when there is information to determine a direct allocation of operating costs, shared operating costs/office expenses will be allocated by a systematic, valid and rational allocation methodology. The methodology will be reviewed annually and presented with the annual budget.

III. MAXIMUM ALLOWABLE ADMINISTRATIVE COSTS AS A PERCENTAGE OF THE OPERATING BUDGET

The Commission will monitor actual Administrative costs so that, in any one year, Administrative costs do not exceed 15% of the Commission's annual operating budget. The Commission may increase or decrease the maximum allowable Administration percentage as changing fiscal or legislative circumstances require.

IV. MONITORING

The Administrative costs' percentage will be monitored quarterly by the Commission's fiscal staff and reported to the Executive Director and Finance Committee. In the event that Administrative costs exceed 15% of the operating budget, the Commission will review and approve a corrective action plan to achieve the desired percentage. The Commission may increase or decrease the maximum allowable Administration percentage as changing fiscal or legislative circumstances require.



SUBJECT: SUPPLANTATION POLICY

PROHIBITING USE OF COMMISSION FUNDS TO SUPPLANT STATE OR LOCAL GOVERNMENT FUNDS

PURPOSE: The purpose of the policy is to assure compliance with Proposition 10, adopted by the voters in 1998. Revenue & Taxation Code Section 30131.4 provides, in part, that Proposition 10 funds shall be used only to supplement existing levels of service and not to fund existing levels of service. It further provides that no money in the commission's trust fund shall be used to supplant state or local general fund money for any purpose.

POLICY:

1. No Commission funds shall be used to supplant state or local general fund money for any purpose. Commission funds shall be used only to supplement existing levels of service and not to fund existing levels of service.
2. To that end, no Commission funds shall be granted or used for any existing project or program funded by state or local general funds unless the proponent demonstrates to the Commission's satisfaction that the Commission's funding will be used to improve the quality or quantity of an existing service, and not to supplant existing funding.
3. The prohibition on supplantation was intended to prevent state and local governments from shifting fiscal responsibility for ongoing public programs to the state and local commissions. The prohibition on supplantation does not refer to privately funded or federally funded programs. Therefore, the prohibition applies only to programs and services currently or previously funded by state or local government general funds, and which are "existing" as defined below.
4. The prohibition on supplantation was not intended to prevent, stifle or discourage state or local government agencies from funding pilot programs, which provide valuable innovations and formation. Therefore, the prohibition should not be interpreted to apply to pilot programs or services, as defined below.

Definitions:

Existing means, with respect to a level of service, a service that is in effect or operation at the time a request for funding is acted upon by the Commission, or at any time within the 12-month period preceding the Commission's action.

State general funds means funds which are received into the treasury of the State and not required by law to be credited to any other fund.¹

¹ See Gov. Code § 16300.

Local government general funds means funds which are received into the treasury of the local government and not specially appropriated to any other fund.²

Level of service includes both the quality and quantity of services.

Pilot with respect to programs or services means those that are implemented on a temporary and limited basis in order to test and evaluate the effectiveness of the program, develop new techniques, or gather information.³

Supplant shall be given its ordinary meaning, that is, “to take the place of.”

Guidelines:

1. Every applicant must disclose in its application whether the program has received funding from other sources (whether local or state government, private, or federal) within the past three years, and as to any public funding, identify the law or program under which funding was received.
2. Any applicant that discloses that state or local government funding has been received for the proposed program or service within the last three years must also demonstrate to the Commission’s satisfaction:
 - a) That the program or service has not received state or local general funds within the 12 month period preceding the Commission’s action, or
 - b) That, if received, such funds have not been reduced during the 12 month period preceding the Commission’s action, or
 - c) That the program or service was a pilot project, and
 - d) That the Commission’s funds will be used to augment or improve the existing level of service, either in terms of quantity or quality.
3. The Commission may require the applicant to provide any additional information regarding sources and uses of funds at any time. Based upon all existing facts and circumstances, the Commission shall determine whether the proposal would violate this policy. The Commission’s determination will be made as of the time a grant agreement is executed. For multi-year contracts or commitments, the Commission reserves the right to re-examine its determination that its funds will not be used in violation of this policy.

² See Gov. Code § 29301

³ See Penal Code § 5058.1



SUBJECT: DELEGATION OF AUTHORITY TO EXECUTIVE DIRECTOR TO TAKE ACTION TO SUPPORT OR OPPOSE LEGISLATION OR OTHER INITIATIVES

PURPOSE: On occasion, the Executive Director is approached with a time-sensitive request to sign a letter of support for (or opposition to) legislation or other initiatives related to First 5 San Mateo County Commission's mission. This policy is intended to delegate authority to the Executive Director to take necessary action to provide that support (or opposition) consistent with the First 5 San Mateo County Commission's mission when certain conditions are met.

POLICY:

The First 5 Commission hereby delegates its authority to the Executive Director to sign documents or other materials on behalf of First 5 San Mateo County Commission ("First 5 San Mateo County" or the "Commission"), when all of the following conditions are met:

1. The legislation or other initiative is directly related to, and consistent with First 5 San Mateo County's mission.
2. Because of time constraints, bringing the matter to the Commission at its next scheduled meeting is not practical.
3. Calling a special meeting to address the matter is either not practical or not appropriate under the circumstances.
4. The Executive Director has conferred with the Chair of the Commission and both the Executive Director and the Chair agree that: (a) the position that the Executive Director intends to take is consistent with the mission of First 5 San Mateo County; (b) bringing the matter to the Commission at its next scheduled meeting or at a special meeting is not practical or appropriate under the circumstances; and (c) taking the position without a vote of the Commission is appropriate under the circumstances.
5. The Executive Director reports at the next regularly scheduled Commission meeting as part of the Executive Director's Report any position taken pursuant to this policy.



SUBJECT: EVENT SPONSORSHIP POLICY

PURPOSE: To provide support for events targeted at children prenatally to age 5 and their families in San Mateo County.

POLICY: First 5 San Mateo County may provide sponsorship to an event and/or scholarships to parents or providers in the form of funding that meets the Event Sponsorship Eligibility Criteria

First 5 San Mateo County (F5SMC) has a core strength and long history in developing partnerships and facilitating collaboration. Our vision of ***success for every child*** would not be possible without the collaboration of our partners throughout the County.

This set of guidelines provides direction for potential community partners interested in receiving sponsorship for community events. The goal is to sponsor community events that broaden F5SMC's reach into the community and focus on the following focus areas as defined in our strategic plan:

- Healthy Children
- Resilient Families
- Quality Care and Education

Event Sponsorship Eligibility Criteria

Parents or providers may request a sponsorship if the event meets the following criteria:

- The event ties to one or more of the focus areas above and are consistent with the Commission's vision and mission.
- The event targets families/children prenatally to age 5, high priority populations or communities as defined by F5SMC.
- The event takes place in San Mateo County.
- The event provides F5SMC with advertisement opportunity and/or includes F5SMC in promotions ***prior*** to, and ***during*** the event (e.g., print, radio, web, and televised advertisement and promotions).
- The event provides a booth space for F5SMC staff to participate during the event, if appropriate.
- The requesting agency coordinates with F5SMC staff to ensure proper crediting policy and general marketing is consistent with F5SMC standards and Style Guide whenever possible.
- The event is designated smoke free.
- The event is not used to lobby for or against or otherwise attempt to influence legislation.
- The event is not used for religious purposes.
- The event is not used for fundraising purposes.

Event Sponsorship Award Amounts

- The Event Sponsorship Budget will be determined as part of the annual budget cycle preparation.
- Event Sponsorship requests up the amount of \$5,000 or less are reviewed and approved by the Executive Director; approval is based on meeting the eligibility criteria and is contingent upon budget appropriations.

Standards for Collaboration

- F5SMC will not endorse, directly or through implied endorsement, specific products, services, educational programs or enterprises.
- As a public agency, products developed in collaboration with F5SMC are in the public domain.

Post Event Reporting

- Sponsorship recipient will provide F5SMC with event outcomes data including but not limited to: attendance and participation of other community agencies; attendance of children up to age 5 and their families; an overall description of the event highlighting the value of community collaboration and of First 5's sponsorship investment.
- A representative from the requesting agency may also be asked to make a brief presentation at a F5SMC Commission Meeting.

Organizations and businesses interested in the Event Sponsorship Program must submit the Sponsorship Request Form, which can be obtained from First 5 San Mateo County staff or downloaded at first5sanmateo.org.

Requests must be received eight weeks prior to the proposed event date. Event Sponsorship Requests will be accepted on a continuous basis as long as funding is available.

Submit Questions and/or Sponsorship Requests to:

Myra Cruz

1700 S. El Camino Real, Suite 405

San Mateo, CA 94402

ecruz@smcgov.org

**FIRST 5 SAN MATEO COUNTY COMMISSION
BYLAWS
Amended May 2025**

ARTICLE I (Authority)

These bylaws (“Bylaws”) are adopted by the First 5 San Mateo County Commission (the “Commission” or “F5SMC”) to establish rules for its proceedings. The Commission is authorized by, and shall operate consistent with, the Children and Families First Act of 1998, as amended (the “State Act”), and Chapter 2.24 of the San Mateo County Ordinance Code, as amended (the “County Ordinance”).

ARTICLE II (Vision, Mission, Outcomes and Status)

The vision of the Commission is “Success for every child.”

The mission of the Commission is to promote positive outcomes for young children and their families through strategic investments, community leadership, and effective partnerships.

F5SMC adopted the following desired outcomes to guide its efforts in its 2020 - 2025 Strategic Plan:

1. San Mateo County prioritizes young children and their families;
2. Communities provide a safe and healthy environment for young children;
3. Children have access to high-quality early care and education settings;
4. Families feel connected to and supported by their community and are able to nurture their children’s health and development;
5. Children have healthy attachments to their parents and caregivers; and
6. Children have access to and are utilizing appropriate health care services to meet their health and developmental needs.

F5SMC is an agency of the County of San Mateo (the “County”) with independent authority over the Strategic Plan and the Local Trust Fund. Obligations of F5SMC shall be the obligations solely of the Commission and shall not directly or indirectly be obligations of the County or any officials, employees or agents of the County. The County shall not be liable for any act or omission of the Commission.

ARTICLE III (Powers and Duties)

The duties of the Commission shall be those proscribed in the State Act and the County Ordinance and may include the following:

- Adopt Strategic Plan for the support and improvement of early childhood improvement within the County, consistent with the requirements of the State Act and any other applicable state laws and County guidelines.

- At least annually, conduct a review of the Strategic Plan and revise the plan as may be necessary or appropriate, and conduct at least one public hearing on the Commission's review of the plan before any revisions to the plan are adopted and submitted to the First 5 California Commission (the "State Commission").
- Measure outcomes of funded programs through the use of applicable, reliable indicators and review on a periodic basis as part of the public review of the Strategic Plan.
- Prepare and adopt an annual audit and report pursuant to Health and Safety Code Section 130150, and conduct at least one public hearing prior to adopting any annual audit or report.
- Review the State First 5 California Commission annual report at a public hearing.
- Adopt policies and procedures consistent with the requirements of the State Act.
- Establish one or more advisory committees to provide technical and professional expertise and support for any purposes that will be beneficial in accomplishing the purposes of the State Act.
- Enter into such contracts as necessary or appropriate to carry out the provisions and purposes of the State Act or the County Ordinance.

ARTICLE IV (Commission Membership)

The composition of the Commission, and the membership qualifications, terms, entitlement to compensation, and all other aspects of Commission membership shall be as proscribed by the County Ordinance or the State Act in the absence of an applicable provision of the County Ordinance.

ARTICLE V (Conflicts of Interest Policy)

The Commission shall by resolution adopt and may amend a Conflicts of Interest policy for the Commission as required by applicable law. Any such policy, and any amendments thereto, shall be consistent with County policies and requirements.

Each Commissioner shall file a statement disclosing reportable economic interests in accordance with the Political Reform Act of 1974 and the regulations of the Fair Political Practices Commission and the Commission's Conflict of Interest Policy.

ARTICLE VI (Officers)

1. Officers:

- A. Officers of the Commission shall be a Chair and Vice-Chair and such other officers as the Commission may from time to time provide. The Chair, who shall be a Commissioner, shall preside over all business and meetings of the Commission, appoint chairs of standing and *ad hoc* committees, and exercise such other powers and perform such other duties as may be prescribed by the Commission.

- B. The Vice Chair shall be a Commissioner, and in the Chair's absence or inability to act, shall preside at the meetings of the Commission. If both the Chair and Vice-Chair will be absent or unable to act at a meeting at which a quorum of the Commission will be present, the Chair may in advance of said meeting appoint a Commissioner to preside at said meeting over all business of the Commission, appoint chairs of standing and ad hoc committees, and exercise such powers and perform such other duties of the Chair as may be prescribed by the Commission.

2. Terms and Removal:

Officers of the Commission shall be chosen annually through an election to be held at the last scheduled meeting of each calendar year, unless an earlier election is necessary because of a vacancy or vacancies on the Commission. Officers shall serve from the date of their election until a successor is selected, or until an earlier removal or resignation.

ARTICLE VII (Staffing)

1. Executive Director:

The Commission hires, evaluates, and terminates the Executive Director. The Executive Director shall act under the authority of, and in accordance with the direction of the Commission.

2. Staff:

The Executive Director hires, evaluates and terminates F5SMC Staff.

ARTICLE VIII (Meetings)

1. Regular and Special Meetings:

- A. The Commission and its standing committee(s) shall be subject to the provisions of Chapter 9 (Commencing with Section 54950) of Part I, Division 2 Title 5 of the Government Code, relating to meetings of local agencies (the "Ralph M. Brown Act" or the "Brown Act").
- B. The Commission shall meet regularly at times and places to be determined by the Commission. There shall be at least 4 meetings each calendar year, generally on the fourth (4th) Monday of the month.
- C. Special meetings may be called at a time and place designated by the Chair. The Commission staff shall give notices of regular and special meetings in accordance with the Brown Act.

2. Open and Public:

All meetings of the Commission shall be held in accordance with the Brown Act.

3. Quorum:

A quorum is required to initiate the transaction of business at any regular or special meeting of the Commission. A quorum is a majority of the seated members of the Commission. A meeting

at which a quorum is initially present may continue to transact business notwithstanding the withdrawal of Commissioners, provided that any action taken is approved by at least four Commissioners.

4. Voting:

Except as otherwise provided by these Bylaws, all official acts of the Commission require the affirmative vote of a majority of the Commissioners who are present and voting as long as the quorum requirements are met. No official act shall be approved with less than the affirmative vote of four Commissioners.

5. Recusals:

A Commissioner shall recuse him or herself from making, participating in making, or in any way attempting to use his or her official position to influence a decision on a contract or grant where the contract or grant directly relates to services to be provided by that Commissioner or the entity that the Commissioner represents or financially benefits the Commissioner or the entity that he or she represents, or as otherwise required by applicable law or by the Conflict of Interest Policy of the Commission.

6. Minutes:

Commission staff shall prepare the minutes of each meeting of the Commission.

7. Attendance:

The Commission expects its members to attend Commission meetings regularly and consistently. Commission members should notify the First 5 Operation Coordinator of any planned absences, at least 48 hours in advance, unless unforeseen emergencies occur. If a Commission Member has more than three (3) unexcused absences at Board meetings or three (3) unexcused absences at Standing Committee meetings, the Commission Chair will direct staff to notify the subject Commission member with the intention of resolving the participation issue. If there is a further unexcused absence by the Commission member the Commission Chair and the Executive Director will request that the Commission member step down and staff will work to designate a replacement. Unexcused absence is defined as not having provided written notification prior to the meeting.

ARTICLE IX (Committees)

1. Advisory Committees:

The Commission shall establish one or more advisory committees to provide technical and professional expertise and support for any purpose that will be beneficial in accomplishing the purpose of the State Act and of the Commission. Advisory committees shall meet and shall make recommendations and reports as deemed necessary or appropriate.

A. Early Childhood Evaluation Advisory Committee:

The duties and responsibilities of this Committee shall be to advise the full Commission on issues related to planning and implementing the Commission's research and evaluation activities; to hear the perspectives of F5SMC grantees on evaluation and data collection and utilization; to serve as the initial audience for

research and evaluation findings; and to provide guidance to staff and evaluation contractors regarding presentation of results to the full Commission.

2. Standing Committees and Appointment of Members:

The Commission may establish standing and *ad hoc* committees and appoint members to those committees, wherever necessary. The following standing committees have been established: the Finance and Administration Committee and the Program, Operations and Planning Committee.

A. Finance and Administration Committee:

The duties and responsibilities of the Finance and Administration Committee shall be to advise the Commission concerning the budget, administrative costs, savings, investments, fixed assets, long term financial plan, financial objectives, funding strategies and annual allocation plan, annual financial audit, and other tasks and issues as assigned by the Commission.

B. Program, Operations and Planning Committee:

The duties and responsibilities of the Program, Operations and Planning Committee shall be to advise the Commission concerning the First 5 San Mateo County Strategic Plan, policies concerning programs to be implemented and supported under the Strategic Plan, community needs assessments, program evaluations and other tasks and issues as assigned by the Commission.

3. Conflicts of Interest:

Commission members shall abide by all applicable laws, policies and regulations governing conflicts of interest, including those adopted by this Commission, the Board of Supervisors and the State Commission.

4. Committee Membership:

Notwithstanding section 3 above, persons who are not members of the Commission, including other elected officials and public members, may be appointed to serve on any committee established by the Commission. Unless otherwise provided, standing committee memberships shall be reviewed annually by either the Chair or the Commission as a whole.

5. Meetings:

Regular meetings of standing committees shall be held at times and places determined by the Commission. Special meetings may be held at any time and place as designated by the Chair of the Commission or the Chair of the Committee. A majority of the members of the committee shall constitute a quorum for that committee.

6. Open and Public:

All meetings of standing committees shall be held in accordance with the Brown Act.

ARTICLE X (Procedures for Conduct of Business)

- A. The Commission shall approve and execute all service agreements, memorandums of understanding, and/or contracts with a total obligation amount that exceeds \$100,000. Any related contract amendment that brings the Contract's not to exceed amount to \$100,000 or greater shall also be approved and executed by the Commission in advance of execution of the agreement.
- B. The Executive Director of First 5 San Mateo County is authorized to approve and execute service agreements, memorandums of understanding and/or contracts with a total obligation amount less than or equal to \$25,000. The Executive Director has signature authority to approve all service agreements, memorandums of understanding, and/or contracts with a total obligation amount between \$25,001 and \$100,000 on behalf of the Commission. In the event of an emergency in which the Executive Director is unable to sign and execute service agreements, memorandums of understanding and/or contracts, the Deputy Director will have signature authority, after consultation with the Commission Chair.

1. Executive Director Signature Authority:

The Executive Director of First 5 San Mateo County is authorized to approve and execute service agreements, memorandums of understanding and/or contracts with a total obligation amount less than or equal to \$25,000. The Executive Director has signature authority to approve all service agreements, memorandums of understanding, and/or contracts with a total obligation amount between \$25,001 and \$100,000 on behalf of the Commission. In the event of an emergency in which the Executive Director is unable to sign and execute service agreements, memorandums of understanding and/or contracts, the Deputy Director will have signature authority, after consultation with the Commission Chair.

2. Apply for Grants:

All grants, gifts, or bequests of money made to or for the benefit of the Commission from public or private sources to be used for early childhood development programs shall be expended for the specific purpose for which the grant, gift, or bequest was made. The amount of any such grant, gift, or bequest shall not be considered in computing the amount allocated and appropriated to the Commission by the State Board of Equalization.

ARTICLES XI (Amendments)

These Bylaws may be amended or repealed by the Commission at any duly-noticed regular or special meeting by a majority vote of the Commissioners who are present and voting as long as the quorum requirements are met. No amendment to or repeal of these Bylaws shall be approved with less than the affirmative vote of five Commissioners.

DATE ADOPTED: _____

SIGNED BY:

Chair, First 5 San Mateo County Commission

DATE: May 19, 2025

TO: First 5 San Mateo County Commission

FROM: Kitty Lopez, Executive Director

RE: Approval of First 5 San Mateo County's FY 2025-26 Draft Budget and the Use of Ending Fund Balance (Ending Reserves*) to Fund FY 2025-26 Adopted Budget

ACTION REQUESTED

Approval of First 5 San Mateo County's FY 2025-26 Draft Budget and the Use of Ending Fund Balance (Ending Reserves*) to Fund FY 2025-26 Adopted Budget.

1. FY 2025-26 DRAFT BUDGET ASSUMPTIONS & BACKGROUND

- Projected Interest earning rate is 2.0% on the Beginning Fund Balance of FY 2025-26 Draft Budget, as a conservative approach to revenue projections.
- Use Tobacco Tax Revenue projections with Flavor Ban released by First 5 California on April 16, 2025, which reflects 6% declining rate from previous projected declining rate of 4% of Tobacco Tax Revenue projections. The Flavor Ban on Tobacco products causes lower tobacco consumption and therefore lower Tobacco Tax Revenue. First 5's Tobacco Tax Revenue allocations are based on County's actual birth rate (noted in bullet #4 of the Glossary /References section below)
- Execute the new Strategic Plan Implementation Plan (SPIP) FY 2025-28 for the first year of 3-year funding cycle; we expect to contract the allocated Program Appropriations in FY 2025-26 Draft Budget, equal to \$2.600 M for each year of the 3 year funding cycle, already as part of the Long-Term Financial Plan (LTFP)
- Continue implementation of \$650K of SPIP FY 2023-25 Carry Over in coordination with 3-year time frame of SPIP FY 2025-28. Any underspending funds of SPIP FY 2023-25 Carry Over will be returned to Fund Balance by 6/30/28.
- Execute \$1.560 M Other Grant Revenues and \$2.015 M Baby Bonus Program Revenue.
- Continue current shared cost allocation to Program Appropriations with the following rates:
 - ✓ 100% Program and Evaluation Staff's Salaries and Benefits.
 - ✓ 27% Shared Admin Staff time; and
 - ✓ 50% of Shared Operating Budget
- * FY 2025-26 Revised Budget to occur in February 2026, after the FY 2024-25 Financial Audit completion and when under spending contracts and audited Ending Fund Balance (as of 6.30.2025) become available.
- * On May 12, 2025, the Finance & Administration Committee met to review the FY 2025-26 Draft Budget and recommend its approval at the May 19, 2025 Commission Meeting.

2. SUMMARY OF FY 2025-26 DRAFT BUDGET

Please read this Budget memo in conjunction with FY 2025-26 Draft Budget presented in **Attachments 9A, 9B, and 9C** (Schedule 1 and Schedule 2).

F5SMC's FY 2025-26 Draft Budget with the summary of budget changes as follows:

	FY 2024-25 Revised Budget	FY25-26 Draft Budget	Increase / (Decrease) \$	Increase / (Decrease) %
Beginning Fund Balance (Beginning Reserves*)	13,509,181	11,969,912	(1,539,269)	(11%)
Total Revenues	7,263,697	7,589,088	325,391	4%
Total Available Fund (Total Sources*)	20,772,878	19,559,000	(1,213,878)	(6%)
Total Appropriations (Net Appropriations*)	8,802,966	8,521,502	(281,463)	(3%)
Ending Fund Balance (Ending Reserves*)	11,969,912	11,037,498	(932,414)	(8%)
Total Requirements*(Net Appropriations*+Ending Reserves*)	20,772,878	19,559,000	(1,213,878)	(6%)
Surplus / (Deficit) (Total Revenues – Net Appropriations*)	(1,539,269)	(932,414)	606,855	(39%)

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*

3. FISCAL IMPACTS

FY 2025-26 Draft Budget changes result in a net Total Budget Deficit of \$932,414; this represents a lower Budget Deficit by \$606,855 than the Budget Deficit in the FY 2024-25 Revised Budget of \$1,539,269. Major contributions to the Budget Deficit amount are associated with lower Beginning Fund Balance, lower Tobacco Tax Revenue, some Other Grants ending. Therefore, we will draw and encumber a total of \$932,414 from the Ending Reserves* to support the implementation of the new strategic plan FY 2025-28, and to leverage additional funding sources.

The net change of Ending Fund Balance (Ending Reserves*) will be a decrease by (\$932,414) as a result of the budget adjustments in Total Revenues and Total Appropriations in the FY 2025-26 Draft Budget.

The Administrative Cost Rate is projected 10%, which is below 15% of the proposed approved Administrative Cost Policy for the FY 2025-26. F5SMC has implemented Administrative Cost rate of 15% since 2020.

ACTION REQUESTED

Approval of First 5 San Mateo County's FY 2025-26 Draft Budget and the Use of Ending Fund Balance (Ending Reserves*) in the amount of \$932,414 to Fund FY 2025-26 Adopted Budget.

FY 2025-26 DRAFT BUDGET NARRATIVES are presented in **Attachments 9A, 9B, and 9C** (Schedule 1 and Schedule 2).

A. BEGINNING FUND BALANCE (Beginning Reserves*)

- Ending Fund Balance (Ending Reserves*) of FY 2024-25 Revised Budget is carried over to become Beginning Fund Balance of FY 2025-26 Draft Budget.
- Beginning Fund Balance (Beginning Reserves*) produce a net decrease of (\$1,539,269) or 11% due to lower Ending Fund Balance in FY 2024-25 Revised Budget. First 5 continues to draw down Fund Balance (Reserves*) to be used as matching and leverage funds in acquiring additional new Other Grants to support Community Investments, as per Commission approved LTTP. Beginning Fund Balance will be adjusted when under spending contracts and audited Ending Fund Balance (as of 6.30.2025) become available after the fiscal year financial audit completion in late October 2025.

B. TOTAL REVENUES

	FY24-25 Revised Budget	FY25-26 Draft Budget	FY25-26 Draft Budget (+/-) vs. FY24-25 Revised Budget (\$)	FY25-26 Draft Budget (+/-) vs. FY24-25 Revised Budget (%)	Notes to FY2025-26 Draft Budget
BEGINNING FUND BALANCE (Beginning Reserves*)	13,509,181	11,969,912	(1,539,269)	-11%	
A. Interest Revenue	405,275	240,000	(165,275)	-41%	2.00% Interest earning rate
B. Tobacco Tax Revenue	4,275,958	3,774,088	(501,870)	-12%	
Tobacco Tax Revenue Fiscal Year Allocations	4,275,958	3,774,088	(501,870)	-12%	update with Tobacco Tax Revenue Projections April 16, 2025
C1. Other Grant Revenues	1,755,261	1,560,000	(195,261)	-11%	
F5 San Benito IMPACT LEGACY Grant FY23-25	360,672		(360,672)	-100%	Other Grants ended 6.30.2025
F5 San Benito Regional Home Visiting Grant FY23-25	92,000		(92,000)	-100%	Other Grants ended 6.30.2025
F5 San Benito IMPACT HUB TA FY23-25	56,489		(56,489)	-100%	Other Grants ended 6.30.2025
County of San Mateo BHRS - Mental Health Services MHSA #4 FY25-26	150,000	1,000,000	850,000	567%	One time grant award
Peninsula Healthcare District - Help Me Grow SMC CY2025		60,000	60,000		
Sequoia Healthcare District - Special Needs Grant FY23-25	461,700		(461,700)	-100%	Other Grants ended 6.30.2025
Sequoia Healthcare District - Mental Health Grant FY23-25	134,400		(134,400)	-100%	Other Grants ended 6.30.2025
Children and Youth Behavior Health Initiatives - Round 2	500,000	500,000	0	0%	Two-year grant award
C2. Other Grant - Baby Bonus Program	827,203	2,015,000	1,187,797	144%	
SMC Health, Family Health Services - Baby Bonus Dividend Program**	177,203	182,700	5,497	3%	WOC Community Health Planner
Health Plan of San Mateo - Baby Bonus Program	500,000	1,240,000	740,000	148%	
County CEO - Measure K - Baby Bonus Program	50,000		(50,000)	-100%	
Silicon Valley Community F. - CZI - Baby Bonus Program	50,000	300,000	250,000	500%	
Sobrato Family Foundation - Baby Bonus Program	50,000	180,000	130,000	260%	
Jackie Speier Foundation - Baby Bonus Program			0		
Peninsula Healthcare District - Baby Bonus Program		112,300	112,300		
TOTAL REVENUES	7,263,697	7,589,088	325,391	4%	
TOTAL AVAILABLE FUNDS (TOTAL SOURCES*)	20,772,878	19,559,000	(1,213,878)	-6%	Major contributions to 6% net decrease in Total Available Fund are attributable to lower Interest Revenue, lower Tobacco Tax Revenue allocations, and some Other Grants ended off set by the increases of Other Grant Baby Bonus

Total Revenues produce a net increase of \$325,391 or 4% increase.

- (\$165,275) Interest Revenue decrease or 41% decrease due to lower Beginning Fund Balance.
- (\$501,870) Tobacco Tax Revenue decrease or 12% decrease per the new Tobacco Tax Revenue projections released by First 5 California on April 16, 2025.
- (\$195,261) Other Grant Revenues decreases or 11% decrease as some Other Grants ended 6.30.2025.
- \$1,187,797 Baby Bonus Program Revenue increases or 144% increases as the Baby Bonus Program implementation of its 2nd year.

C. TOTAL AVAILABLE FUND (Total Sources*)

Total Available Funds (Total Sources*) produce a net decrease of (\$1,213,878) or 6% decrease.

Major contributions to 6% net decrease in Total Available Fund are attributable to lower Interest Revenue, lower Tobacco Tax Revenue allocations, and some Other Grants ended offset by the increases of Other Grant Baby Bonus Program Revenues.

D. PROGRAM APPROPRIATIONS

Total Program Appropriations produce a net decrease of (\$293,257) or 4% decrease.

D1. Strategic Plan Investment - SPIP FY 2025-28; FY 25-26 Appropriations Noted Below

	FY24-25 Revised Budget	FY25-26 Draft Budget	FY25-26 Draft Budget [+/-] vs. FY24-25 Revised Budget (\$)	FY25-26 Draft Budget [+/-] vs. FY24-25 Revised Budget [%]	Notes to FY2025-26 Draft Budget
APPROPRIATIONS					
PROGRAM APPROPRIATIONS					
D1. Strategic Plan Investment - SPIP FY 25-28 Primary Domains					
		2,600,000	2,600,000		New strategic plan
Resilient Family		746,000	746,000		
Healthy Children		670,000	670,000		
Quality Care and Education		600,000	600,000		
Grant Management and Other Evaluation Projects		98,000	98,000		
Policy Advocacy, Communications & Systems Change		486,000	486,000		

SPIP FY 2025-28 Appropriations produce a net increase \$2,600,000. SPIP FY 2025-28, which is tentatively budgeted while the procurement and contracting are ongoing at this time.

- \$746,000 investment in Resilient Family
- \$670,000 investment in Healthy Children.
- \$600,000 investment in Quality Care and Education.
- \$98,000 investment in Evaluation
- \$486,000 investment in Policy, Advocacy, Communication, and System Changes PAC and Emerging Projects.

D2. Strategic Plan Investment - SPIP FY 2023-25 Carry-Over

SSIP FY 2023-25 Carry-Over produces a net decrease of (\$3,455,000) or 91% decrease as the SSIP FY 2023-25 community investment is ending; only \$650,000 SSIP FY 2023-25 is approved to be carried- over in the next 3 years in coordination with SSIP FY 2025-28.

	FY24-25 Revised Budget	FY25-26 Draft Budget	FY25-26 Draft Budget (+/-) vs. FY24-25 Revised Budget (\$)	FY25-26 Draft Budget (+/-) vs. FY24-25 Revised Budget (%)	Notes to FY2025-26 Draft Budget
APPROPRIATIONS					
PROGRAM APPROPRIATIONS					
D2. Strategic Plan Investment - SSIP FY 23-25 Carry Over	3,780,000	325,000	(3,455,000)	-91%	\$650K SSIP FY23-25 carry over in 3 years in coordination with the new strategic plan implementation plan SSIP FY25-28
Resilient Family	1,060,000		(1,060,000)	-100%	
Healthy Children	1,060,000	150,000	(910,000)	-86%	
Quality Care and Education	1,060,000		(1,060,000)	-100%	
Grant Management and Other Evaluation Projects	113,000		(113,000)	-100%	
Other Evaluation Projects	0		0	#DIV/0!	
Policy Advocacy, Communications & Systems Change	380,000	115,000	(265,000)	-70%	
Emerging Projects	107,000	60,000	(47,000)	-44%	

- (\$1,060,000) decrease in SSIP FY 2023-25 Carry Over – Resilient Family.
- (910,000) decrease in SSIP FY 2023-25 Carry Over – Healthy Children.
- (\$1,060,000) decrease in SSIP FY 2023-25 Carry Over – Quality Care and Education.
- (\$113,000) decrease in SSIP FY 2023-25 Carry Over – Grant Management and Evaluation.
- (\$265,000) decrease in SSIP FY 2023-25 Carry Over – Policy, Advocacy, Communications, and Systems Changes.
- (\$47,000) decrease in SSIP FY 2023-25 Carry Over – Emerging Projects.

D3. Strategic Plan Investment - SSIP FY 2020-23 Carry-Over

	FY24-25 Revised Budget	FY25-26 Draft Budget	FY25-26 Draft Budget (+/-) vs. FY24-25 Revised Budget (\$)	FY25-26 Draft Budget (+/-) vs. FY24-25 Revised Budget (%)	Notes to FY2025-26 Draft Budget
APPROPRIATIONS					
PROGRAM APPROPRIATIONS					
D3. Strategic Plan Investment - SSIP FY 20-23 Carry-Over	533,319	0	(533,319)	-100%	Underspend fund on 6.30.2025 is return to Func Balance
Healthy Children	159,881		(159,881)	-100%	
Grant Management and Other Evaluation Projects	80,000		(80,000)	-100%	
Other Evaluation Projects	0		0	#DIV/0!	
Policy Advocacy, Communications & Systems Change	70,000		(70,000)	-100%	
Emerging Projects	223,438		(223,438)	-100%	

SSIP FY 2020-23 Carry Over produces a net decrease of (\$533,319) or 100% decrease as any underspending fund at the end of fiscal year ending 6/30/2025 will be return to Funding Balance.

- (\$159,881) decrease in SSIP FY 2020-23 Carry Over in Health Children

- (\$80,000) decrease in SPIP FY 2020-23 Carry Over in Grant Management and Evaluation.
- (\$70,000) decrease in SPIP FY 2020-23 Carry Over in Policy Advocacy, Communications and Systems Changes.
- (\$223,438) decrease in SPIP FY 2020-23 Carry Over in Emerging Projects.

E1. Other Grants Appropriations:

	FY24-25 Revised Budget	FY25-26 Draft Budget	FY25-26 Draft Budget (+/-) vs. FY24-25 Revised Budget (\$)	FY25-26 Draft Budget (+/-) vs. FY24-25 Revised Budget [%]	Notes to FY2025-26 Draft Budget
E1. Other Grant Appropriations	1,538,442	1,400,000	(138,442)	-9%	
F5 San Benito IMPACT LEGACY Grant FY23-25	290,672		(290,672)	-100%	Grant ended 6.30.2025
F5 San Benito Regional Home Visiting Grant FY23-25	54,000		(54,000)	-100%	Grant ended 6.30.2025
F5 San Benito IMPACT HUB TA FY23-25	53,520		(53,520)	-100%	Grant ended 6.30.2025
County of San Mateo BHRS - Mental Health Services MHSA #4 FY25-26	106,250	900,000	793,750	747%	
Peninsula Healthcare District - Help Me Grow SMC CY2025	50,000	50,000	0	0%	
Sequoia Healthcare District - Special Needs Grant FY23-25	400,000		(400,000)	-100%	Grant ended 6.30.2025
Sequoia Healthcare District - Mental Health Grant FY23-25	134,000		(134,000)	-100%	Grant ended 6.30.2025
Children and Youth Behavior Health Initiatives - Round 2	450,000	450,000	0	0%	

Other Grants produce a net decrease of (\$138,442) or 9% decrease.

- (\$290,672) decrease in F5 San Benito Impact Legacy grant ending 6.30.2025.
- (\$54,000) decrease in F5 San Benito Home Visiting grant ending 6.30.2025.
- (\$53,520) decrease in F5 San Benito Impact Hub as the grant ending 6.30.2025.
- \$793,750 increase in Behavior Health & Recovery System – MHSA #4 FY 2025-26.
- (\$400,000) decrease in Sequoia Healthcare District – Integrated System of Children with Special Needs as the grant ending 6.30.2025.
- (\$134,000) decrease in Sequoia Healthcare District – Early Childhood Mental Health Initiatives as the grant ending 6.30.2025.

E2. Other Grants Appropriations – Baby Bonus Program

	FY24-25 Revised Budget	FY25-26 Draft Budget	FY25-26 Draft Budget (+/-) vs. FY24-25 Revised Budget (\$)	FY25-26 Draft Budget (+/-) vs. FY24-25 Revised Budget [%]	Notes to FY2025-26 Draft Budget
APPROPRIATIONS					
PROGRAM APPROPRIATIONS					
E2. Other Grant Appropriations - Baby Bonus Program	797,203	2,015,000	1,217,797	153%	
SMC Health, Family Health Services - Baby Bonus Dividend Program**	177,203	182,700	5,497	3%	Community Health Planner - WOC position
Health Plan of San Mateo - Baby Bonus Program	500,000	1,240,000	740,000	148%	
County CEO - Measure K - Baby Bonus Program	40,000		(40,000)	-100%	
Silicon Valley Community F. - CZI - Baby Bonus Program	40,000	300,000	260,000	650%	
Sobrato Family Foundation - Baby Bonus Program	40,000	180,000	140,000	350%	
Jackie Speier Foundation - Baby Bonus Program					
Peninsula Healthcare District - Baby Bonus Program		112,300	112,300		

Other Grants – Baby Bonus Program produce a net increase of \$1,217,797 or 153% increase.

- \$5,497 increase in San Mateo County Health & Family Health Services – Baby Bonus Program
- \$740,000 increase in Health Plan of San Mateo – Baby Bonus Program
- (\$40,000) decrease in San Mateo County CEO Measure K – Baby Bonus Program.
- \$260,000 increase in Silicon Valley Community Foundation - CZI – Baby Bonus Program
- \$140,000 increase in Sobrato Family Foundation – Baby Bonus Program
- \$112,300 increase in Peninsula Healthcare District – Baby Bonus Program

F. Program Operations Appropriations

Program Operations produce a net increase of \$15,707 or 2% increase.

Major contributions to 2% net increase are associated with the increase of First 5 California Association Membership Dues, County services cost, healthcare cost, and cost of living COLA offset by the negotiated First 5 SMC Office Lease reductions.

G. ADMINISTRATIVE APPROPRIATIONS:

Administrative Operations: net increase of \$11,793 or 1% increase.

Major contributions to 1% increase are associated to the increases of First 5 California Association Membership Dues, County services cost, healthcare cost, and cost of living COLA offset by the negotiated Office Lease reductions.

H. FY 2025-26 DRAFT OPERATING BUDGET (Schedule 1)

FY 2025-26 Draft Operating Budget produce net decreases (\$20,876) or 5% decrease due the increases of First 5 California Association Membership Dues, County services cost, healthcare cost, and cost of living COLA are offset by the negotiated Office Lease reductions (Fall, 2025).

I. SALARIES AND BENEFITS (Schedule 2)

FY 2025-26 Draft Salaries & Benefits Budget produce net increases \$48,376 or 3% increase due to the inclusions of projected healthcare cost increases and cost of living COLA.

J. TOTAL APPROPRIATIONS

Total Appropriations (Net Appropriations*) produce a net decrease of \$281,463 or 3% decrease.

Major contributions to 3% net decrease in Total Appropriations are associated with the ends of SPIP FY 2020-23, SPIP FY 2023-25, and some Other Grants ended on 6.30.2025 offset by the implementation of the new strategic plan SPIP FY 2025-28 and the execution of the Baby Bonus Program.

K. ENDING FUND BALANCE

Ending Fund Balance (Ending Reserves*) produce a net decrease of (\$932,414) or 8% decrease.

Major contributions to 8% net decrease in Ending Fund Balance are associated with lower Interest Revenue, lower Tobacco Tax Revenue projections offset with the implementation of the new strategic plan SPIP FY 2025-28 and the Baby Bonus Program.

L. GLOSSARY / REFERENCES

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 to 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 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.
3. F5SMC has two main revenue streams: (a) monthly Tobacco Tax Revenue disbursements based on actual birth rate in each county; and (b) Other Grant Revenues are acquired from F5 California, Other F5 Commissions, and or other funders through competitive grant applications.
4. Tobacco Tax Revenue projections are based on estimated Proposition 10 tax revenue, Proposition 56 backfill, estimated interest earned by the account, less adjustments for California Department of Tax and Fee Administration's administrative costs and statewide assessments.

F5CA released annual Tobacco Tax Revenue Projections by county each fiscal year based on projected birth rate of each county. When the published birth rate data becomes available, State Finance Department will update Tobacco Tax Revenue Projections based on the actual birth rate of each county. The data can be found on Department of Finance's website at the following link: [P_CY_Births_Report.xlsx \(live.com\)](#).

5. F5SMC is a Non-General Fund Department or Zero Net County Cost Department of County of San Mateo, F5SMC funding sources is Tobacco Tax Revenue disbursed by the State of California; therefore, the San Mateo County's Reserves Policy is not applicable to F5SMC.

Per *County Recommended Budget Instructions and Guide FY 2025-27*, page 14, non-general fund department can retain 100% of fund balances unless there is agreement to do otherwise.

FIRST 5 SAN MATEO COUNTY

FY 2025-26 DRAFT BUDGET SUMMARY

	FY24-25 Revised Budget	FY25-26 Draft Budget	FY25-26 Draft Budget (+/-) vs. FY24-25 Revised Budget (\$)	FY25-26 Draft Budget (+/-) vs. FY24-25 Revised Budget (%)
BEGINNING FUND BALANCE (Beginning Reserves*)	13,509,181	11,969,912	(1,539,269)	-11%
A. Interest Revenue	405,275	240,000	(165,275)	-41%
B. Tobacco Tax Revenue	4,275,958	3,774,088	(501,870)	-12%
Tobacco Tax Revenue Fiscal Year Allocations	4,275,958	3,774,088	(501,870)	-12%
C1. Other Grant Revenues	1,755,261	1,560,000	(195,261)	-11%
C2. Other Grant Revenues- Baby Bonus Program	827,203	2,015,000	1,187,797	144%
TOTAL REVENUES	7,263,697	7,589,088	325,391	4%
TOTAL AVAILABLE FUND (Total Sources*)	20,772,878	19,559,000	(1,213,878)	-6%
PROGRAM APPROPRIATIONS				
D1. Strategic Plan Investment - SPIP FY 25-28	0	2,600,000	2,600,000	
Resilient Family		746,000	746,000	
Healthy Children		670,000	670,000	
Quality Care and Education		600,000	600,000	
Grant Management and Other Evaluation Projects		98,000	98,000	
Policy Advocacy, Communications & Systems Change		486,000	486,000	
D2. Strategic Plan Investment - SPIP FY 23-25 Carry Over	3,780,000	325,000	(3,455,000)	-91%
Community Investments (RF, HC, QC & E)	3,180,000	150,000	(3,030,000)	-286%
Evaluation	113,000	0	(113,000)	-100%
Policy, Advocacy, & Communications (PAC) & Emerging Projects	487,000	175,000	(312,000)	-114%
D3. Strategic Plan Investment - SPIP FY 20-23 - Carry Over	533,319	0	(533,319)	-100%
Community Investments - Healthy Children	159,881	0	(159,881)	-100%
Evaluation	80,000	0	(80,000)	-100%
Policy, Advocacy, & Communications (PAC) & Emerging Projects	293,438	0	(293,438)	-200%
E1. Other Grant Appropriations	1,538,442	1,400,000	(138,442)	-9%
E2. Other Grant Appropriations - Baby Bonus Program	797,203	2,015,000	1,217,797	153%
F. Program Operations	1,324,519	1,340,226	15,707	1%
Program Shared Operating Budget	220,488	210,050	(10,438)	-5%
Program Staff S&B & Shared Admin Staff Time	901,634	916,830	15,195	2%
Evaluation Staff S&B	202,397	213,346	10,949	5%
Total Program Appropriations (D1+D2+D3+E1+E2+F)	7,973,483	7,680,226	(293,257)	-4%
ADMIN APPROPRIATIONS				
G. Admin Shared Operating Budget	220,488	210,050	(10,438)	-5%
H. Admin Staff S&B	608,995	631,226	22,231	4%
Total Admin Appropriations (G+H)	829,483	841,276	11,793	1%
TOTAL APPROPRIATIONS (Net Appropriations*)	8,802,966	8,521,502	(281,463)	-3%
Surplus / (Deficit) (Total Revenues - Total Appropriations)	-1,539,269	-932,414	606,855	-39%
ENDING FUND BALANCE	11,969,912	11,037,498	(932,414)	-8%
Total S&B	1,713,026	1,761,402	48,376	3%

FIRST 5 SAN MATEO COUNTY

FY 2025-26 DRAFT BUDGET DETAILS

	FY24-25 Revised Budget	FY25-26 Draft Budget	FY25-26 Draft Budget (+/-) vs. FY24-25 Revised Budget (\$)	FY25-26 Draft Budget (+/-) vs. FY24-25 Revised Budget (%)	Notes to FY2025-26 Draft Budget
BEGINNING FUND BALANCE (Beginning Reserves*)	13,509,181	11,969,912	(1,539,269)	-11%	
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B. Tobacco Tax Revenue	4,275,958	3,774,088	(501,870)	-12%	
Tobacco Tax Revenue Fiscal Year Allocations	4,275,958	3,774,088	(501,870)	-12%	update with Tobacco Tax Revenue Projections April 16, 2025
C1. Other Grant Revenues	1,755,261	1,560,000	(195,261)	-11%	
F5 San Benito IMPACT LEGACY Grant FY23-25	360,672		(360,672)	-100%	Other Grants ended 6.30.2025
F5 San Benito Regional Home Visiting Grant FY23-25	92,000		(92,000)	-100%	Other Grants ended 6.30.2025
F5 San Benito IMPACT HUB TA FY23-25	56,489		(56,489)	-100%	Other Grants ended 6.30.2025
County of San Mateo BHRS - Mental Health Services MHSA #4 FY25-26	150,000	1,000,000	850,000	567%	One time grant award
Peninsula Healthcare District - Help Me Grow SMC CY2025		60,000	60,000		
Sequoia Healthcare District - Special Needs Grant FY23-25	461,700		(461,700)	-100%	Other Grants ended 6.30.2025
Sequoia Healthcare District - Mental Health Grant FY23-25	134,400		(134,400)	-100%	Other Grants ended 6.30.2025
Children and Youth Behavior Health Initiatives - Round 2	500,000	500,000	0	0%	Two-year grant award
C2. Other Grant - Baby Bonus Program	827,203	2,015,000	1,187,797	144%	
SMC Health, Family Health Services - Baby Bonus Dividend Program**	177,203	182,700	5,497	3%	WOC Community Health Planner
Health Plan of San Mateo - Baby Bonus Program	500,000	1,240,000	740,000	148%	
County CEO - Measure K - Baby Bonus Program	50,000		(50,000)	-100%	
Silicon Valley Community F. - CZI - Baby Bonus Program	50,000	300,000	250,000	500%	
Sobrato Family Foundation - Baby Bonus Program	50,000	180,000	130,000	260%	
Jackie Speier Foundation - Baby Bonus Program			0		
Peninsula Healthcare District - Baby Bonus Program		112,300	112,300		
TOTAL REVENUES	7,263,697	7,589,088	325,391	4%	
TOTAL AVAILABLE FUNDS (TOTAL SOURCES*)	20,772,878	19,559,000	(1,213,878)	-6%	Major contributions to 6% net decrease in Total Available Fund are attributable to lower Interest Revenue, lower Tobacco Tax Revenue allocations, and some Other Grants ended offset by the increases of Other Grant Baby Bonus
APPROPRIATIONS					
PROGRAM APPROPRIATIONS					
D1. Strategic Plan Investment - SPIP FY 25-28 - Primary Domains		2,600,000	2,600,000		New strategic plan
Resilient Family		746,000	746,000		
Healthy Children		670,000	670,000		
Quality Care and Education		600,000	600,000		
Grant Management and Other Evaluation Projects		98,000	98,000		
Policy Advocacy, Communications & Systems Change		486,000	486,000		
D2. Strategic Plan Investment - SPIP FY 23-25 Carry Over	3,780,000	325,000	(3,455,000)	-91%	\$650K SPIP FY23-25 carry over in 3 years in coordination with the new strategic plan implementation plan SPIP FY25-28
Resilient Family	1,060,000		(1,060,000)	-100%	
Healthy Children	1,060,000	150,000	(910,000)	-86%	
Quality Care and Education	1,060,000		(1,060,000)	-100%	
Grant Management and Other Evaluation Projects	113,000		(113,000)	-100%	
Other Evaluation Projects	0		0	#DIV/0!	
Policy Advocacy, Communications & Systems Change	380,000	115,000	(265,000)	-70%	
Emerging Projects	107,000	60,000	(47,000)	-44%	

	FY24-25 Revised Budget	FY25-26 Draft Budget	FY25-26 Draft Budget (+/-) vs. FY24-25 Revised Budget (\$)	FY25-26 Draft Budget (+/-) vs. FY24-25 Revised Budget (%)	Notes to FY2025-26 Draft Budget
D3. Strategic Plan Investment - SPIP FY 20-23 Carry-Over	533,319	0	(533,319)	-100%	Underspend fund on 6.30.2025 is return to Fund Balance
Healthy Children	159,881		(159,881)	-100%	
Grant Management and Other Evaluation Projects	80,000		(80,000)	-100%	
Other Evaluation Projects	0		0	#DIV/0!	
Policy Advocacy, Communications & Systems Change	70,000		(70,000)	-100%	
Emerging Projects	223,438		(223,438)	-100%	
E1. Other Grant Appropriations	1,538,442	1,400,000	(138,442)	-9%	
F5 San Benito IMPACT LEGACY Grant FY23-25	290,672		(290,672)	-100%	Grant ended 6.30.2025
F5 San Benito Regional Home Visiting Grant FY23-25	54,000		(54,000)	-100%	Grant ended 6.30.2025
F5 San Benito IMPACT HUB TA FY23-25	53,520		(53,520)	-100%	Grant ended 6.30.2025
County of San Mateo BHRS - Mental Health Services MHSA #4 FY25-26	106,250	900,000	793,750	747%	
Peninsula Healthcare District - Help Me Grow SMC CY2025	50,000	50,000	0	0%	
Sequoia Healthcare District - Special Needs Grant FY23-25	400,000		(400,000)	-100%	Grant ended 6.30.2025
Sequoia Healthcare District - Mental Health Grant FY23-25	134,000		(134,000)	-100%	Grant ended 6.30.2025
Children and Youth Behavior Health Initiatives - Round 2	450,000	450,000	0	0%	
E2. Other Grant Appropriations - Baby Bonus Program	797,203	2,015,000	1,217,797	153%	
SMC Health, Family Health Services - Baby Bonus Dividend Program**	177,203	182,700	5,497	3%	Community Health Planner - WOC position
Health Plan of San Mateo - Baby Bonus Program	500,000	1,240,000	740,000	148%	
County CEO - Measure K - Baby Bonus Program	40,000		(40,000)	-100%	
Silicon Valley Community F. - CZI - Baby Bonus Program	40,000	300,000	260,000	650%	
Sobrato Family Foundation - Baby Bonus Program	40,000	180,000	140,000	350%	
Jackie Speier Foundation - Baby Bonus Program					
Peninsula Healthcare District - Baby Bonus Program		112,300	112,300		
F. Program Operations	1,324,519	1,340,226	15,707	2%	0
Program Shared Operating Budget	220,488	210,050	(10,438)	-5%	
Program Staff S&B & Shared Admin Staff	901,634	916,830	15,195	2%	Excluding WOC - Community Health Planner position for the Baby Bonus Program
Evaluation Staff S&B	202,397	213,346	10,949	5%	
Total Program Appropriations (D1+D2+D3+E1+E2+F)	7,973,483	7,680,226	-293,257	-4%	Major contributions to 4% net decrease in Total Program Appropriations are associated with the ends of SPIP FY 2020-23, SPIP FY 2023-25, and some Other Grants ended on 6.30.2025 offset by the implementation of the new strategic plan SPIP FY 2025-28 and the Baby Bonus Program
ADMIN APPROPRIATIONS					
G. Admin Shared Operating Budget	220,488	210,050	(10,438)	-5%	
H. Admin Staff S&B	608,995	631,226	22,231	4%	
Total Administrative Appropriations	829,483	841,276	11,793	1%	0
Administrative Cost Rate %	9%	10%			
TOTAL APPROPRIATIONS (NET APPROPRIATIONS*)	8,802,966	8,521,502	-281,463	-3%	Major contributions to 3% net decrease in Total Appropriations are associated with the ends of SPIP FY 2020-23, SPIP FY 2023-25, and some Other Grants ended on 6.30.2025 offset by the implementation of the new strategic plan SPIP FY 2025-28 and the Baby Bonus Program.
ENDING FUND BALANCE (ENDING RESERVES*)	11,969,912	11,037,498	-932,414	-8%	Major contributions to 8% net decrease in Ending Fund Balance are associated with lower Interest Revenue, lower Tobacco Tax Revenue projections offset with the implementation of the new strategic plan SPIP FY 2025-28 and the Baby Bonus Program

Color Coding

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

Schedule 1- FY 2025-26 DRAFT OPERATING BUDGET

Attachment 9C

	ORG / ACCT#	FY24-25 Revised Budget	FY25-26 Draft Budget	FY25-26 Draft Budget (+/-) vs. FY24-25 Revised Budget (\$)	FY25-26 Draft Budget (+/-) vs. FY24-25 Revised Budget (%)	Notes to FY2025-26 Draft Budget
I. Services and Supplies						
Outside Printing & Copy Svc	19510-5191	2,000	1,000	(1,000)	-50%	
General Office Supplies	19510-5193	8,000	8,000	0	0%	
Photocopy Lease & Usage	19510-5196	5,000	5,000	0	0%	
Direct Communication Expenses	19510-5132	3,800	1,671	(2,129)	-56%	
Computer Supplies	19510-5211	25,000	10,000	(15,000)	-60%	New laptop replacements
Software License /Maintenance Expenses	19510-5215	6,673	1,090	(5,583)	-84%	Slit to ISD account 6752 with budget of \$6,782 Update with services charge FY25-26 tab
County Memberships - (e.g. F5 Assn Dues)	19510-5331	15,000	33,200	18,200	121%	F5CA Association membership due increase
Auto Allowance	19510-5712	11,000	11,000	0	0%	
Meetings & Conference Expense	19510-5721	8,000	8,000	0	0%	
Commissioners Meetings & Conference Exp	19510-5723	5,000	5,000	0	0%	
Other Business Travel Expense	19510-5724	8,000	8,000	0	0%	
Dept. Employee Training Expense	19510-5731	5,327	5,327	0	0%	
Wellness grant	19510-5856	0	0	0		
Other Professional Services	19510-5858	27,500	28,500	1,000	4%	County Controller Office Service agreements
Sub Total - Services & Supplies		130,300	125,788	(4,512)	-3%	-
II. Other Charges						
Telephone Service Charges	19510-6712		434	434		
Automation Services - ISD	19510-6713	46,854	36,664	(10,190)	-22%	Slit to ISD accounts 6752,6754,6758,6763,6770
Annual Facilities Lease	19510-6716	109,000	80,000	(29,000)	-27%	Negotiated rent reductions
General Liability Insurance	19510-6725	19,090	22,059	2,969	16%	
Official Bond Insurance	19510-6727	319	298	(21)	-7%	
Human Resources Services	19510-6733	323	264	(59)	-18%	
Countywide Security Services	19510-6738	692	756	64	9%	
All Other Service Charges	19510-6739	60,210	60,210	0	0%	
Card Key Services	19510-6751	1,042	962	(80)	-8%	
ISD Prvd Software Lic/Maint	19510-6752		6,789	6,789		
Data Backup & Recovery Subsc	19510-6754		636	636		
Desktop Support Subscription	19510-6758		8,150	8,150		
Virtual Private Network Subs	19510-6763		303	303		
Virtual Server Subscription	19510-6770		3,602	3,602		
A-87 Expense	19510-6821	73,146	73,185	39	0%	
Sub Total - Other Charges		310,676	294,312	-16,364	-5%	Increase in county service cost offset by negotiated rent reduction.
Total Operating Budget		440,976	420,100	(20,876)	-5%	Major contributions to the 5% net decrease due the increases of First 5 California Association membership due, County services cost, healthcare cost, and cost of living COLA are offset by the negotiated rent reductions.
Program Shared Operating Budget		220,488	210,050	(10,438)	-5%	Allocation rate 50%
Admin Shared Operating Budget		220,488	210,050	(10,438)	-5%	Allocation rate 50%

Schedule 2 - FY 2025-26 DRAFT SALARIES & BENEFITS BUDGET

Program Staff & Shared Admin Staff		901,634		916,830	15,195	2%	27% Admin staff time allocated to Program
Evaluation Staff		202,397		213,346	10,949	5%	
Admin Staff		608,995		631,226	22,231	4%	
F5SMC Salaries and Benefits		\$ 1,713,026		\$ 1,761,402	48,376	3%	Including COLA and Healthcare cost increases
Baby Bonus Dividend Program - WOC		\$ 177,203		\$ 182,700	5,497	3%	

**FIRST 5 SAN MATEO COUNTY (F5SMC)
FIRST 5 STAFF TEAM REPORT
MAY 2025**

STRATEGIC INVESTMENT FOCUS AREAS – UPDATE

QUALITY CARE AND EDUCATION

Build UP SMC and Canopy!

“Bring your friends, your energy, and your love for little learners—let’s plant something beautiful together!”

“This event is part of the launch of Build Up for San Mateo County’s Climate Initiative, demonstrating how child care can partner with environmental and sustainability leaders to help lead the way in climate resilience. As temperatures rise and air quality declines, planting trees is a simple, powerful step we can take together to create safer, healthier spaces where young children can thrive. To learn more about this pilot program or the other climate resources Build Up is launching visit <https://www.buildupsmc.org/>.”

(See Attachment 10.1)

POLICY & ADVOCACY UPDATES

Support Letter: AB 1357- Exempting Guaranteed Income from Public Benefit Calculations

On May 8, 2025, First 5 San Mateo County submitted a support letter to Hon. Buffy Wicks, Chair of Assembly Appropriations Committee, and Hon. Alex Lee, Chair of Assembly of Human Services Committee to support AB 1357, which would exclude guaranteed income payments from being considered in determining eligibility for public benefit programs. (See Attachment 10.2)

Meeting with San Mateo Legislators

On May 6 and May 9, 2025, Kitty Lopez, Executive Director and Michelle Blakely, Deputy Director met with Senator Josh Becker, and Assemblymembers Diane Papan and Marc Berman to share First 5 SMC Program Updates and garner their support for statewide early childhood issues such as retaining Medi-Cal funding and continuity of care for young children as well as other critical programs in the state budget.

FIRST 5 CALIFORNIA & FIRST 5 ASSOCIATION UPDATES

First 5 Association Bay Area Regional Executive Directors (BAREDs)

The Bay Area Regional Directors, including First 5 San Mateo County, submitted their support to the following bills:

- [AB 55](#) – streamlines licensing requirements for alternative birth centers to increase access to maternity care and additional birth options, with the goal of addressing the needs of communities underserved by birthing options.
- [AB 403](#) - This bill would require the Department of Health Care Services (DHCS, to provide an annual report to the Legislature and the public on the usage of and outreach being done on the Community Health Workers (CHW) Medi-Cal benefit.

- [AB 1129](#) - This bill would allow (but not require) a Local Health Officer (LHO) to make birth defects and birth conditions occurring or diagnosed in a child's first year reportable and to implement a local birth reporting for those birth defects and conditions program.
- [SB 669](#) - This bill would establish a pilot project to allow critical access and small rural hospitals to have trained staff and equipment on standby to receive patients with urgent obstetric problems in coordination with an alternative birthing center to address the problem of maternity deserts.
(See Attachment 10.3)

COMMUNITY AND STATEWIDE EVENTS & UPDATES

Town of Colma Dia de los Ninos and San Bruno Park School District Wellness Fair

On April 30, 2025, First 5 San Mateo County participated in Día de los Niños at the Town of Colma, where 76 attendees visited the First 5 table. They also took part in the San Bruno Park School District Wellness Fair on May 14, 2025, engaging with 87 families. At both events, First 5 shared valuable resource information with families.

COMMUNICATIONS

What's New?

- [Stronger Together: Parent Mental Health Resources](#): May is Mental Health Awareness Month, and on this page, we're sharing blogs and resources focused on mental health for children and families.
- **Quarterly e-Newsletter**: On May 7, 2025, F5SMC send out its quarterly electronic newsletter, featuring topics such as the 2025–2030 Strategic Plan, advocacy efforts for Head Start, and investments in strengthening the early childhood mental health system.

Social Media and Analytics Reports (See Attachment 10.4)

ROOTED IN CARE.
GROWING RESILIENCE.
ONE TREE AT A TIME.

PRESCHOOL TREE PLANTING

IZZI EPA & IZZI MAGNOLIA

RAVENSWOOD ○ ○ ○ ○

1395 BAY ROAD, EAST PALO ALTO

MAY 17
9 AM – 12 PM



- All ages welcome! Join the fun or help plant trees!
- Closed toed shoes, clothes to plant trees recommended.
- To sign-up to volunteer, scan QR code or click [here](#).
- Questions? Contact Arlene at arlene@canopy.org.



BUILD UP
SAN MATEO COUNTY



SUPPORTED BY MEASURE K
**LOCAL FUNDS
LOCAL NEEDS**
WWW.SMCGOV.ORG



Attachment 10.2

first5sanmateo.org

1700 S. El Camino Real, Suite 405,
San Mateo, CA 94402
T 650.372.9500, F 650.372.9588

May 8, 2025

The Honorable Buffy Wicks
Chair, Assembly Appropriations Committee
1021 O Street, Suite 8220
Sacramento, CA 95814

The Honorable Alex Lee
Chair, Assembly Human Services Committee
1020 N Street, Room 124
Sacramento, CA 95814

RE: Support for AB 1357 – Exempting guaranteed income from public benefit calculations - SPONSOR

Dear Chairs Wicks and Lee,

On behalf of First 5 San Mateo County, we strongly support AB 1357, which would exempt guaranteed income payments from consideration when determining eligibility for public benefit programs.

First 5 San Mateo County, in collaboration with multiple local agencies, has recently launched a guaranteed income pilot program for Medi-Cal parents, which provides \$300 per month to families from a child's birth to age three. The Baby Bonus pilot, spearheaded by former Congresswoman / now Supervisor Jackie Speier, seeks to demonstrate the impact that a modest amount of cash, similar to the federal Child Tax Credit, can have on the health and well-being of young children. The cash support is not sufficient to replace employment income or public benefits. It is meant to alleviate the burden of essential costs like rent, food, diapers, and childcare, and help buffer a family from falling deeper into poverty. We know that poverty and instability in early childhood can have negative lifelong impacts.

Californians receiving guaranteed income while also enrolled in critical public benefit programs like Medi-Cal and CAPI are often penalized with reduced or lost benefits. This phenomenon, known as the "benefits cliff" creates an impossible choice: accept modest monthly cash support or retain the essential public benefits they rely on. Instead of allowing these financial supports to compliment each other, our current benefits system pits them against each other—eroding the impact of both public and private anti-poverty efforts.

California has taken some steps to mitigate this harm by creating waivers which exempt guaranteed income from calculations for eligibility into two specific public benefit programs: CalWORKs and CalFresh. AB 1357 further builds on this progress by creating additional waivers which exempt guaranteed income from additional vital public benefit programs—including **Medi-Cal, California Food Assistance Program (CFAP), General Assistance Program, Kinship Guardianship Assistance Payment,**

Adoption Assistance Program (AAP) and Cash Assistance Program for Immigrants (CAPI). Thereby ensuring that anti-poverty strategies work in alignment—not at odds—with one another.

In summary AB 1357:

- Allows recipients to access guaranteed income without jeopardizing critical public benefits on which they rely;
- Supports families moving toward lasting financial independence; and
- Maximizes the return on public investments

This commonsense reform removes barriers that currently undermine promising anti-poverty efforts, ensures that guaranteed income programs can achieve their intended outcomes and helps to create a more coherent approach to poverty reduction in California.

We strongly support this important legislation.

Sincerely,

A handwritten signature in blue ink that reads "Kitty Lopez". The signature is fluid and cursive, with the first name "Kitty" and last name "Lopez" clearly distinguishable.

Kitty Lopez
Executive Director
First 5 San Mateo County



WESTERN CENTER
ON LAW & POVERTY



AABC
AMERICAN ASSOCIATION
OF BIRTH CENTERS
CALIFORNIA STATE CHAPTER



**BLACK WOMEN
FOR WELLNESS
ACTION PROJECT**



CALM
CALIFORNIA ASSOCIATION OF LICENSED MIDWIVES

AB 55 (Bonta) Freedom to Birth Act Fact Sheet

Summary: AB 55 ensures that licensure of alternative birth centers is more accessible to midwives in California by amending or deleting onerous and unnecessary requirements. These barriers, such as the requirement that the birth center be a Comprehensive Perinatal Service Provider, do not increase patient safety but instead limit access to high-quality maternal healthcare.

PROBLEM

In the past decade, more than 50 labor and delivery wards have closed in California hospitals.

As a result, large areas of California are without access to birthing facilities or maternity care providers.¹



A safe alternative to maternity care for low-risk birthing people are free standing birth centers. Birth centers specialize in childbirth and care for low-risk patients in an environment that is less restrictive and more home-like than a hospital.

Yet current outdated and obstructive licensing requirements are impeding birth centers' ability to obtain licensure.² These requirements present a significant barrier to licensing birth centers including those designed to serve low-income and communities of color.

Of the 27 birth centers open in California, only 4 are licensed by the State of California.

BACKGROUND

Almost half of California births are paid for by Medi-Cal.³ In order to receive Medi-Cal and some commercial insurance reimbursement, California birth centers, including those designed to serve low-income communities and communities of color, must be licensed by the state.

However, existing law includes requirements that create unnecessary and conflicting barriers to birth center licensure. For example, Alternative Birth Centers (ABCs) must be a Comprehensive Perinatal Service Provider (CPSP), which first requires the site to be a Medi-Cal provider. This requirement is burdensome for ABCs that do not serve Medi-Cal patients. For those that do intend to serve Medi-Cal patients, Birth Center Owners report that the requirements of the CPSP unnecessarily duplicates practices already integral to the midwifery model of care and which in some instances exceed CPSP standards.

The absence of access to maternity care has disproportionately impacted California's low-income, Black, Latine, Indigenous, and rural communities.⁴ When maternity wards close, particularly in rural counties, birthing people receive less prenatal care and rates of preterm birth increase.⁵ Currently, twelve counties, most of them rural, do not have any hospitals delivering babies.⁶

Free standing birth centers have demonstrated excellent outcomes for birthing people and infants⁸ including reduced preterm and low birthweight rates, decreased cesarean rates, increased breastfeeding rates and over \$2000 cost savings to Medicaid for every mother/baby when compared to typical care.⁹

Increasing the potential number of birth centers eligible for Medi-Cal payment will positively impact underserved communities by increasing access to less invasive birthing options and will reduce Medi-Cal costs.⁷

SOLUTION

AB 55 will streamline licensing requirements for ABC's, increasing access to maternity care and additional birthing options where it is needed the most.

Contact:

Sandra O. Poole, Western Center on Law and Poverty - spoole@wclp.org

Onyemma Obiekea, Black Women for Wellness Action Project - onyemma@bwwla.com

Raena Granberry, CA Black Women's Health Project - raena@cabwhp.org

Holly Smith, Certified Nurse Midwives Association - Holly@midwiferyrising.org

Bethany Sasaki, American Association of Birth Centers CA Chapter - nursebethany@yahoo.com

Rosanna Davis, California Association of Licensed Midwives - president@calmidwives.org

Citations

1. Kristen Hwang, CA Birth Center Closures Deepen an Existing Maternity Care Crisis. CalMatters, August 26, 2024
2. Daily News; <https://www.dailynews.com/2021/09/05/birth-centers-grow-in-popularity-but-owners-say-its-difficult-to-qualify-for-state-license/>
3. In 2019, there were 440,395 births in California: 212,395 were paid for by Medi-Cal, and 228,000 were paid by non-Medi-Cal sources.
4. Fontenot, J Lucas, R. Stoneburner, A, Brigance, C, Hubbard, K, Jones, E, Mishkin, K, Where you Live Matters: Maternity Care Deserts and the Crisis of Access and Equity in California. March of Dimes. 2023.
5. March of Dimes, Nowhere to Go: Maternity Care Deserts Across the U.S., p. 14 (2022), https://www.marchofdimes.org/sites/default/files/2022-10/2022_Maternity_Care_Report.pdf ("Maternal care workforce shortages are intertwined with maternity ward closures and lead to barriers such as longer distance to travel and longer wait times for care, and are associated with increased out of hospital births and preterm births.")
6. Kristen Hwang, Ana B. Ibarra and Erica Yee, As hospitals close labor wards, large stretches of California are without maternity care. CalMatters, November 15, 2023
7. Medicaid paid \$2,010 less per patient through birth and the year following for each mother-infant pair than for other Medicaid participants with similar characteristics. <https://www.cms.gov/priorities/innovation/files/reports/strongstart-prenatal-fg-finalevalrpt.pdf>
8. Alliman, J., Stapleton, S.R., Wright, J., Bauer, K., K., Slider, K., & Jolles, D. (2019). Strong Start in birth centers; Socio-demographic characteristics, care processes, and outcomes for mothers and newborns. Birth, 46(2), 234-243. <https://doi.org/10.1111/birth.12433>
9. Medi-Cal Explained: Paying for Maternity Services. <https://www.chcf.org/wp-content/uploads/2020/09/MediCalExplainedPayingMaternityServices.pdf>



LIZ ORTEGA

Assemblymember, District 20



AB 403

FACT SHEET

Bill Summary

AB 403 requires the Department of Health Care Services, beginning July 1, 2027, to provide an annual report to the Legislature and the public on the usage of and the outreach being done on the Community Health Workers Medi-Cal benefit.

Existing Law

Establishes community health worker services as a covered Medi-Cal benefit. Existing law requires Medi-Cal managed care plans, under the guidance of the Department of Health Care Services (DHCS), to engage in outreach and education to enrollees about the existence of the CHWs benefit and how enrollees can participate (Section 14132.36 of the Welfare & Institutions Code).

Background

Community health workers (CHWs) serve as liaisons between health and social services and the community. CHWs often serve as both cultural and language interpreters, helping individuals navigate the health care system, communicate with providers, and advocate for the help they need. CHWs are members of, trusted by, or have a close understanding of the communities they serve.

The Budget Act of 2021-22 added CHWs as a covered Medi-Cal benefit, effective July 1, 2022. The DHCS is tasked with disseminating

information about this benefit to Medi-Cal enrollees.

Need for AB 403

In the almost three years since CHWs became a covered Medi-Cal benefit, minimal information has been released by the DHCS regarding the program. Moreover, we have no clear path to learning what new information is being released, what outreach is being done by managed care plans, and how many people are taking advantage of the benefit.

According to DHCS, during the first 18 months of the program, only 5,376 individuals accessed the CHW benefit and less than \$1 million was reimbursed to providers for these services¹.

AB 403 will hold the DHCS accountable to its obligation to promote the CHW benefit and ensure that those who need CHW services can access them. This bill will also increase the Legislature's understanding of the CHW benefit's status, informing any future legislation that is needed to promote or fund this vital program.

Support

Latino Coalition for a Healthy California (co-sponsor)
The Children's Partnership (co-sponsor)
Visión y Compromiso (co-sponsor)

¹ <https://ahea.assembly.ca.gov/media/1681>

California Pan-Ethnic Health Network (co-sponsor)
 Ceres Community Project
 Alianza for Opportunity
 San Ysidro Health
 Asian Americans Advancing Justice - Southern California
 Southeast Asia Resource Action Center
 Nourish California
 Asian Pacific Partners for Empowerment, Advocacy, and Leadership
 Alzheimer's Association
 South Asian Network
 Esperanza Community Housing Corporation
 Regional Asthma Management & Prevention
 Asian Americans for Community Involvement
 California LGBTQ Health and Human Services Network
 AAPI Equity Alliance
 Western Center on Law & Poverty
 APLA Health
 Cancer Kinship
 Farm2people
 California Alliance of Child And Family Services
 Health Access California
 Oasis Legal Services
 Food Empowerment Project
 Drug Policy Alliance
 UCLA Latino Policy & Politics Institute
 Full Circle Health Network
 Mixteco/indígena Community Organizing Project
 Asian Resources, Inc
 Black Women for Wellness Action Project
 Union De Guatemaltecos Emigrantes
 Casa Del Diabetico Gualan
 California Rural Legal Assistance Foundation
 Asociacion De Migrantes Guatemaltecos, LA
 California Immigrant Policy Center
 National Health Law Program
 Los Amigos De La Comunidad
 Thai Community Development Center
 Children Now
 California School-based Health Alliance
 The Los Angeles Trust for Children's Health

Central Coast CHWP Capacity Building Collaborative
 Communities United For Restorative Youth Justice

Oppose

None on file.

For More Information

Colleen Herrmann, Assembly Fellow
 Office of Assemblymember Liz Ortega
 916.319.2769 | colleen.herrmann@asm.ca.gov



AB 1129

Healthy Communities: Local Reporting for Community Public Health Data

Status: Amended 4/22/25

BILL SUMMARY

This bill would allow a Local Health Officer (LHO) to make birth defects and birth conditions occurring or diagnosed in the child's first year reportable and to implement a local birth reporting for those birth defects and conditions program. The LHO may require healthcare facilities, providers and/or laboratories to report these birth defects and conditions in order to inform local healthcare needs. This bill is critical due to both the recent and ongoing environmental crises and other adverse health trends of which health impacts are currently unknown and/or to help children access needed health care early and effectively.

CURRENT LAW

The California Department of Public Health (CDPH) monitors birth defects in the state through the California Birth Defects Monitoring Program (CBDMP). Current laws for reporting birth defects and these conditions by the state do not extend authority to local public health agencies.

BACKGROUND

Monitoring birth defects and conditions is critically important to healthcare decision-making because it can help identify families who might need extra help accessing care, guide healthcare needs, ascertain impact of environmental toxins, and uncover challenges affecting the health of newborns and infants. All 50 states and U.S. territories monitor birth defects and conditions in some form.

Due to funding constraints, the CBDMP operates in only 10 counties, representing approximately 30% of the state's population. The state's most populous or diverse counties, including Alameda, Los Angeles, Santa Clara, and San Francisco are not covered under the statewide monitoring program.

Local public health agencies are seeking to conduct their own birth reporting for birth defects and conditions to improve services for families facing healthcare challenges due to their child's health conditions such as brachial plexus injuries, sickle cell disease, spinal atrophy, cystic fibrosis and hydrocephalus, or to the toxic effects of local environmental challenges such as the wildfires in Los Angeles and other areas of the state and the ongoing underground landfill fire.

SOLUTION

This bill would allow, but not require, LHOs to make birth defects and conditions reportable in their respective jurisdictions and would allow them to monitor those conditions at no additional cost to the state. Under this bill, birth diagnostic information for birth defects and conditions could be provided to the local health office electronically without additional work effort or burden to the reporting institutions.

Health jurisdictions that choose to implement birth defects and conditions monitoring could gain access to public and private funding resources to support their efforts.

SUPPORT

Los Angeles County – Sponsor

Children Now

Health Officers Association of California

CONTACT

Brenda Cisneros-Larios, Ph.D., Legislative Aide

Brenda.Cisneros-Larios@asm.ca.gov

(916)-319-2043

Senate Bill 669

Standby Perinatal Units

Senator McGuire

Summary

SB 669 establishes a pilot project to allow critical access and small rural hospitals to have trained staff and equipment on standby to receive patients with urgent obstetric problems in coordination with an alternative birthing center. The California Department of Public Health (CDPH) would establish this innovative pilot project in communities where volume is insufficient to support a standard permanent perinatal unit. The hospital would be required to meet specially developed alternative standards relating to staffing, training, equipment and services in order to protect patient safety.

Background

In the face of declining birth rates, small and rural hospitals are increasingly closing maternity units. Very low volume causes staffing, safety and fiscal challenges. According to data collected by *CalMatters*, 56 hospitals in the state have stopped delivering babies since 2012 equal to 16% of all general acute care hospitals in California.ⁱ Counties or regions without a hospital or birth center are often referred to as maternity deserts. According to a study cited in a report by the March of Dimesⁱⁱ, the closure of maternity wards is concentrated in rural counties with the most frequent loss in the most remote counties.ⁱⁱⁱ In rural US counties not adjacent to urban areas, obstetric services loss was associated with increased risk of birth in hospitals without obstetric units and preterm birth.^{iv}

Although the majority of women living in maternity care deserts are non-Hispanic White, 12.8 percent of Native American women who gave birth in 2020 also lived in maternity care deserts. In 2020, one in 4 Native American babies (26.7%) were born in areas of limited or no access to maternity care services^v For low risk pregnancies, birthing centers are an alternative and would likely be preferred or considered if more readily available.

Multiple studies have demonstrated that women who received care in a birth center throughout pregnancy, birth and postpartum were more likely to be satisfied when compared to those who received standard hospital maternity care. This satisfaction has been attributed to the positive relationships with providers who deliver personalized, cultural competent and comprehensive care.^{vi} Women who establish a relationship with a specific

provider during delivery are more likely to continue seeking postnatal care from the same provider, even if it requires traveling longer distances.^{vii} When the families establish these relationships with the long-distance providers, the population seeking care in the local community declines which in turn exacerbates challenges caused by declining patient volumes.

At the same time, studies are showing that expanding access to the midwifery model at birthing centers as well as the use of doulas not only increases access and can improve outcomes for all women.^{viii} A review of 32 studies of birth centers found positive health outcomes for women, including lower rates of C-sections compared with women delivering in hospitals.^{ix} Few severe maternal outcomes and no maternal deaths were reported in any of these studies, and overall, women were satisfied with the comprehensive, personalized care that they received. Most notably disparities are can be significantly reduced especially among women of color.^x

Problem

Currently, California law requires a perinatal unit to have appropriate space, equipment, supplies and specifically trained medical staff including physicians and registered nurses on duty at all times. Meeting this standard is not always possible in remote maternity deserts. As a result, pregnant women either have to travel long distances to deliver in a hospital with a perinatal unit, deliver at home with a midwife or find a birthing center within 30 minutes of a licensed perinatal unit.

Solution

SB 669 is an innovative mechanism to test a model that allows a small rural birthing centers to be located in or near a rural hospital that has specially trained staff on call to care for non-life-threatening complications, such as a the need for cesarean or intensive care for the newborn. This will improve access to a local, community based alternative birthing center located in or near their community hospital. Rural women will no longer be at risk of not being able to access a birthing facility in a timely manner, which will ensure their safety and that of their child.

In order to test this model, SB 669 would be limited to a pilot project with set safety and patient protection requirements and would be evaluated.

Contact

Marjorie Swartz
Marjorie.swartz@sen.ca.gov
 Phone: (916) 651-4002

Support

Partnership Health Plan of California (co-sponsor)
 Plumas District Hospital (co-sponsor)
 Association of California Health Districts
 Black Women for Wellness
 Western Center on Law and Poverty



ⁱ [CA hospitals close maternity wards faster than U.S. rate - CalMatters](#)

ⁱⁱ [2022 Maternity Care Report.pdf](#)

ⁱⁱⁱ Kozhimannil KB, Interrante JD, Tuttle MKS, Henning-Smith C. Changes in Hospital-Based Obstetric Services in Rural US Counties, 2014-2018. *JAMA*. 2020;324(2):197-199;

^{iv} [Association Between Loss of Hospital-Based Obstetric Services and Birth Outcomes in Rural Counties in the United States - PMC](#)

^v [2022 Maternity Care Report.pdf](#)

^{vi} https://www.marchofdimes.org/sites/default/files/2022-10/2022_Maternity_Care_Report.pdf

^{vii} https://bmchealthservres.biomedcentral.com/articles/10.1186/s12913-021-07151-3?utm_source=chatgpt.com

^{viii} Hamlin L, Grunwald L, Sturdivant RX, Koehlmoos TP. Comparison of nurse-midwife and physician birth outcomes in the military health system. *Policy Polit Nurs Pract*. 2021;22(2):105-113

^{ix} Victoria G. Woo, Arnold Milstein, and Terry Platchek, "[Hospital-Affiliated Outpatient Birth Centers: A Possible Model for Helping to Achieve the Triple Aim in Obstetrics](#)," *JAMA* 316, no. 14 (Oct. 11, 2016): 1441–42; and Alliman and Phillippi, "Maternal Outcomes in Birth Centers," 2016.

^x Alliman J, Bauer K, Williams T. Freestanding Birth Centers: An Evidence-Based Option for Birth. *J Perinat Educ*. 2022 Jan 1;31(1):8-13. doi: 10.1891/JPE-2021-0024. PMID: 35165499; PMCID: PMC8827343.



REPORT FOR APR 1, 2025 - APR 30, 2025

FIRST 5 SAN MATEO COUNTY

APRIL ANALYTICS OVERVIEW

In April, First 5 San Mateo County's social media efforts focused on promoting the monthly newsletter, introducing new Commission members, sharing partner events, and highlighting the 5 Protective Factors in recognition of Child Abuse Prevention Month. Content also celebrated National Home Visiting Week and spotlighted the San Mateo County Home Visiting System.

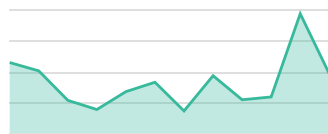
Posts announcing the new Commissioners received the highest engagement on Instagram and Facebook. On LinkedIn, the top-performing post celebrated the Baby Bonus pilot program, generating a high engagement rate and 242 clicks. LinkedIn also saw a notable increase in impressions, engagement, and likes compared to the previous period.

Website traffic saw a decrease from the previous month. The most-visited pages were the Baby Bonus page and the Funding Opportunities page, showing continued interest in family support programs and available resources.

WEBSITE ANALYTICS

SESSIONS

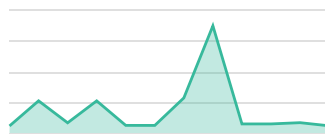
1,458



Previous period
-50%
Previous year
68%

VIEWS PER SESSION

1.60



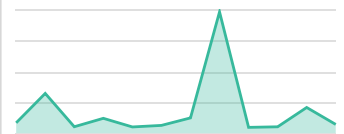
Previous period
-27%
Previous year
-15%

AVG ENGAGEMENT TIME PER SESS

00:00:35

VIEWS

2,340



Previous period
-64%
Previous year
43%

TOP VIEWS BY PAGE

Page Address

Views ▾

/	487
/baby-bonus/	360
/funding-opportunities/	134
/baby-bonus-parent-guide/	119
/resources/	96
/staff/	76
/who-we-are/	74
/es/Los-5-factores-de-protección-por-los-que-importan-los-primeros-cinco-años/	70
/commission/	64
/the-5-protective-factors-why-the-first-five-years-matter/	50
/kit-for-new-parents-2/	45
/strategic-plan/	43
/family-blog/	43
/for-parents-families/	38
/our-work/	34
/our-impact/	31
/past-commission-meetings/	28

EVENT COUNT

Event Name	Event Count
page_view	2,340
user_engagement	1,586
session_start	1,461
first_visit	946
scroll	693
click	191
file_download	157
view_search_results	38
video_progress	4
video_start	2

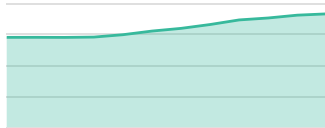
TOP TRAFFIC SOURCES

Session Default Channel Grouping	Sessions
Organic Search	647
Direct	513
Organic Social	169
Referral	114
Paid Social	13
Unassigned	6

FACEBOOK INSIGHTS

FANS COUNT

2,750

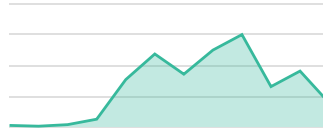


Previous period
1%

Previous year
26%

FAN ADDS

32

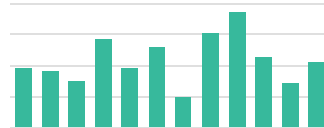


Previous period
-56%

Previous year
967%

PAGE IMPRESSIONS

42,666

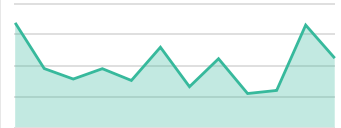


Previous period
49%

Previous year
1,799%

PAGE ENGAGEMENT RATE







2.24%



Previous period
-32%

Previous year
-62%

TOP POSTS BY ENGAGEMENT TYPE (WITH IMAGE)

Post With Image	Post Comments	Post Shares	Total Reactions
 <p>First 5 San Mateo County is honored to welcome Jackie Speier to our Commission! A lifelong public servant and fearless advocate for families, Jackie brings decades of leadership and dedication to improving the lives of...</p>	N/A	N/A	3
 <p>First 5 San Mateo County is excited to welcome Colleen Chawla to our Commission! With a distinguished career in public health leadership and a deep commitment to equity and community well-being, Colleen brings...</p>	N/A	N/A	2
 <p>Responsive, caring parenting starts with understanding your child's needs. Because every child grows at their own pace, early support can make all the difference. Developmental screenings and help for families navigating these...</p>	N/A	N/A	2
 <p>On behalf of The Family Resource Center (FRC) of San Mateo County, First 5 San Mateo County would like to invite you to participate in this online training to learn about the Transition from Golden Gate Regional Center's...</p>	N/A	N/A	1
 <p>Belonging is at the heart of strong communities and healthy child development. When families feel truly included and supported, they can access the resources they need to thrive. Investing in local networks not only...</p>	N/A	N/A	1
 <p>Every parent, especially new parents, have challenges - stress, uncertainty, moments that feel overwhelming. In the first five years of life, children look to their parents for stability and comfort. This is why we offer resources ...</p>	N/A	N/A	1

TOP POSTS BY ENGAGEMENT

Post	
Belonging is at the heart of strong communities and hea...	8
Responsive, caring parenting starts with understanding y...	4
Every parent, especially new parents, have challenges - st...	3
On behalf of The Family Resource Center (FRC) of San ...	3
First 5 San Mateo County is honored to welcome Jackie S...	3
Adverse Childhood Experiences (ACEs) are stressful or tr...	2
Building resilience matters, but families also need real su...	2
San Mateo County's Home Visiting System Coordination ...	2
Every child deserves the best start in life - and it begins a...	2
In recognition of National Home Visiting Week, San Mate...	2

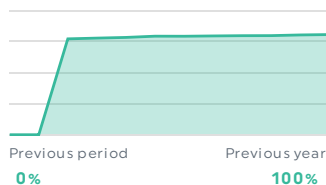
TOP POSTS BY IMPRESSIONS

Post	Post Impressions
First 5 San Mateo County is excited to welcom...	190
First 5 San Mateo County is thrilled to welcom...	130
On behalf of The Family Resource Center (FR...	80
When families thrive economically, children a...	72
Belonging is at the heart of strong communit...	69
Every parent, especially new parents, have cha...	68
Our newsletter provides information on what'...	64
San Mateo County's Home Visiting System Co...	63
First 5 San Mateo County is honored to welco...	56
Building resilience matters, but families also n...	55

INSTAGRAM INSIGHTS

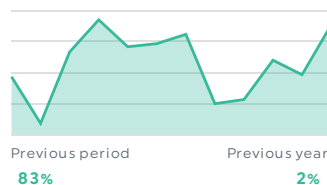
FOLLOWERS

1,613



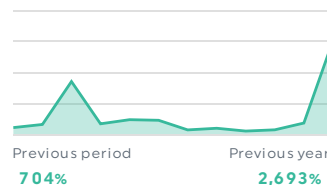
LIKES

106



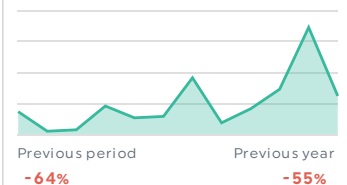
IMPRESSIONS

45,407









ENGAGEMENT RATE

3.13%



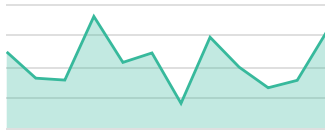
ENGAGEMENT BY POST (WITH IMAGE)

Post With Image	Likes	Comments	Engagement
 <p>Introducing Jackie Speier to the First 5 San Mateo County Commission</p> <p>First 5 San Mateo County is honored to welcome Jackie Speier to our Commission! A lifelong public servant and fearless advocate for families, Jackie brings decades of leadership and dedication to improving the lives of children and families in our community. Currently</p>	12	0	13
 <p>Introducing Colleen Chawla to the First 5 San Mateo County Commission</p> <p>First 5 San Mateo County is excited to welcome Colleen Chawla to our Commission! With a distinguished career in public health leadership and a deep commitment to equity and community well-being, Colleen brings invaluable expertise to our work supporting young</p>	11	0	12
 <p>San Mateo County's Home Visiting System Coordination is making meaningful progress in enhancing services for young children and their families. We're committed to building a home visiting system that grows with families - one that's coordinated, accessible and</p>	10	0	10
 <p>Our partners</p> <p>Our work with partners in San Mateo County have led to a decrease in the poverty rate for families with children. Continued investment in community well-being makes a difference for families. It takes a village to raise a family, so a whole child approach requires investments in</p>	8	1	9
 <p>Community is everything!</p> <p>Belonging is at the heart of strong communities and healthy child development. When families feel truly included and supported, they can access the resources they need to thrive. Investing in local networks not only strengthens communities—it creates nurturing environments where</p>	7	0	8
 <p>Building resilience</p> <p>Building resilience matters, but families also need real support when challenges arise. We're committed to providing resources, meaningful interventions, and long term support so every family has access to essentials like food, shelter and health resources. We believe building strong</p>	6	0	6

FACEBOOK AND INSTAGRAM ADS

AMOUNT SPENT

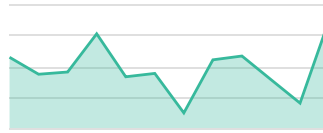
\$466.19



Previous period **99%** Previous year **100%**

REACH

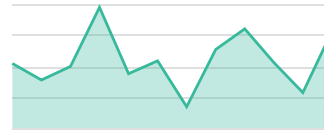
43,812



Previous period **322%** Previous year **100%**

IMPRESSIONS

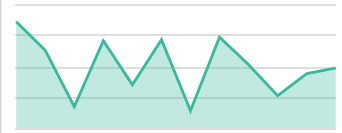
78,546



Previous period **169%** Previous year **100%**

CLICKS (ALL)

981





Previous period **10%** Previous year **100%**

TOP CAMPAIGN BY CLICKS (ALL)

Campaign Name	Clicks (All) ▾
Instagram Engagement Campaign	750
Page Likes Ads 2025	130
Instagram post: Did you read our latest...	64
Creative A/B Test - Child Abuse Prevention Ads 4-25	37

ENGAGEMENT BY AD

Ad ID with image	Post Reactions ▾	Link Clicks
 Financial Stability Engagement Ad (id : 120219731609070763)	1,342	0
 Infant Mental Health Engagement Ad (id : 120219734915480763)	500	0

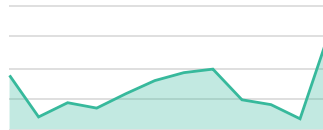
LINKEDIN INSIGHTS

FOLLOWERS

269

IMPRESSIONS

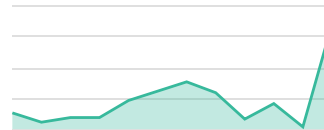
1,562



Previous period **768%** Previous year **-17%**

LIKES

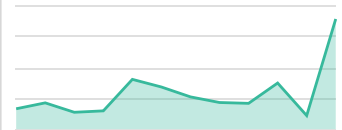
68



Previous period **3,300%** Previous year **19%**







ENGAGEMENT RATE

21.4%



Previous period **672%** Previous year **139%**

TOP POSTS BY ENGAGEMENT RATE

Post with image	Engagement Rate ▾	Likes	Clicks
 <p>Last week, First 5 San Mateo County brought our partners together to celebrate the beginning of the Baby Bonus Pilot Program. For the past year @[Health Plan of San Mateo \ (HPSM\)](urn:li:organization:9299445), San Mateo County Health, @[County of San Mateo Human Services](urn:li:organization:55681484), @[The Jackie Speier Foundation]</p>	33.8%	38	242
<p>Thank you @[Christine Padilla](urn:li:person:IMRBmm3XWP) for being a champion for young children. Please read her op-ed. Head Start is essential to San Mateo County, and programs like @[Izzi Early Education \ (formerly IHSD Inc.\)](urn:li:organization:3988816) provide unmatched early education that benefit our entire community.</p>	25.0%	6	3
 <p>Did you read our latest newsletter? We shared updates on our home visiting work, children's oral health, and more. Click the link below to get caught up. https://lnkd.in/gncVGtnK</p>	11.9%	2	5
 <p>Investing in our community means investing in our future. Strong support systems lead to resilient families and successful children. We are proud to be your partner as we continue to build a brighter tomorrow together. To see all of the different community partners we work with, take a look at our website! https://lnkd.in/gjrQ-Rsh</p>	11.1%	4	2
 <p>Our work with partners in San Mateo County have led to a decrease in the poverty rate for families with children. Continued investment in community well-being makes a difference for families. It takes a village to raise a family, so a whole child approach requires investments in community-centered services.</p>	7.5%	3	0
<p>This month, we're shining a light on preventing child abuse and neglect by sharing 5 key protective factors that help strengthen and support families. Follow along as we highlight ways to foster healthy and resilient families so all children can thrive. https://lnkd.in/gGstpM8y</p>	7.3%	1	2
 <p>First 5 San Mateo County is excited to welcome Colleen Chawla to our Commission! With a distinguished career in public health leadership and a deep commitment to equity and community well-being, Colleen brings invaluable expertise to our work supporting young children and families. Colleen currently serves as the chief of San Mateo County Health,</p>	7.3%	5	4
 <p>Belonging is at the heart of strong communities and healthy child development. When families feel truly included and supported, they can access the resources they need to thrive. Investing in local networks not only strengthens communities—it creates nurturing environments where every child and family feels valued and connected. Learn more about</p>	5.6%	1	1

DATE: May 19, 2025
TO: First 5 San Mateo County (F5SMC) Commission
FROM: Kitty Lopez, Executive Director
RE: Committee Updates

Finance and Administration Committee Meeting – May 12, 2025

Commissioner: Claire Cunningham, Carla Boragno, Sylvia Espinoza

Staff: Kitty Lopez, Khanh Chau

1. Review and Recommend Approval of First 5 San Mateo County Policies Bylaws for FY 2025-26

Kitty Lopez stated that F5SMC Commissions must review and approve F5SMC's policies and Bylaws annually for state compliance requirements. As presented in the memo of Policies and Bylaws for FY 2025-26, except the Amended Bylaws May 2025 (Attachment 3H), there are no changes to other Policies. The Amended Bylaws is to add the Attendance clause to Article III of the Bylaws. Kitty Lopez stated the Commission expects its members to attend Commission meetings regularly and consistently. Commission members should notify the First 5 Operation Coordinator of any planned absences. If a Commission Member has more than three (3) unexcused absences at Board meetings or three (3) unexcused absences at Standing Committee meetings, the Commission Chair will direct staff to notify the subject Commission member with the intention of resolving the participation issue. If there is a further unexcused absence by the Commission member the Commission Chair and the Executive Director will request that the Commission member step down and staff will work to designate a replacement. Unexcused absence is defined as not having provided written notification prior to the meeting.

Committee members reviewed other unchanged Policies; asked how often we should review Policies and Bylaws. Staff responded that F5 Commissions must review Policies and Bylaws in a public hearing annually for the state, First 5 California, and audit compliance requirements.

Committee members reviewed and discussed the amended Bylaws. Committee members suggested the inclusion of 48 hour notification in advance for any intended absence from the Commission meeting, unless emergency cases.

Committee voted and endorsed the recommendation and approval of the Policies and Bylaws for FY 2025-26 to Commission.

2. Review of Budget Monitoring Report as of April 30, 2025

Kitty Lopez cited that the agency presents quarterly Budget Monitoring Reports to the Finance and Administration Committee for review. At the Finance and Administration Committee meetings, Committee members will have deeper review, discussion, questions, and clarifications of finance documents, and make recommendations to the full Commission.

Kitty Lopez briefly presented an overview of the Budget Monitoring Report as of April 30, 2025, comparing to 83% YTD Benchmark (**Attachments 11A, 11B, 11C, 11D**). YTD Total Revenue is 5% higher than YTD benchmark due to the inclusion of Prop 56 tax revenue disbursement.

Total Appropriations is 19% below YTD Benchmark due to s2—month delayed Baby Bonus Program execution, underspending in various TRISI programs and underspending in various Admin Expenses due to staff working more outside of the office environment.

Projected Ending Fund balance of \$13.808 million or 115% of the planned budget or \$1.837 million higher than the planned budget.

Committee members reviewed and asked questions for clarifications about the Budget Monitoring Report as of April 30, 2025. Committee members had no further questions.

3. Review and Recommend Approval of First 5 San Mateo County (F5SMC) Draft Budget FY 2025-26 and the Use of Ending Fund Balance (Ending Reserves*) to fund the Draft Budget FY 2025-26

Kitty Lopez provided key budget changes in the F5SMC's FY 2025-26 Draft Budget, as presented in the summary table of the Budget memo and Budget Narratives (Attachment 5) and Budget Worksheets (Attachments 5A, 5B, 5C).

Committee members suggested staff to (1) move the section FY 2025-26 Draft Budget Assumptions and Background before the Summary of the FY 2025-26 Draft Budget for clarity; (2) to restate Commission approval items; and (3) may present separately Commission approved allocated investment amounts, funding amounts already contracted, funding amounts in pending contract negotiation, pending RFQs, and unallocated funding amounts, if any.

Committee members reviewed the F5SMC's FY 2025-26 Draft Budget, asked questions for clarification. Committee members endorsed the recommendation for approval of F5SMC's FY 2025-26 Draft Budget and the Use of Ending Fund Balance (Ending Reserves*) to Fund F5SMC's FY2025-26 Draft Budget.

Next Finance and Administration Committee Meeting is on Monday June 9, 2025.

DATE: May 19, 2025
TO: First 5 San Mateo County Commission
FROM: Kitty Lopez, Executive Director
RE: Budget Monitoring Report as of April 30, 2025

BUDGET MONITORING REPORT as of April 30, 2025, HIGHLIGHTS
Budget Monitoring Report as of April 30, 2025, Highlights

YTD Benchmark: 83%

The Budget Monitoring Report as of April 30, 2025, is presented in **Attachments 11B, 11C, and 11D** with key summary highlights are as following:

	FY 2024-25 Revised Budget	YTD April 30, 2025 Combined Actual & Accrual	YTD Combined vs. FY24-25 Revised Budget (%)	Notes to Budget Monitoring Report as of April 30, 2025
Beginning Fund Balance (Beginning Reserves*)	13,509,181	13,509,181	100%	
Total Revenues	7,263,697	5,891,954	81%	Delayed execution of the Baby Bonus program and slow TRISI grant execution
Total Available Fund (Total Sources*)	20,772,878	19,401,135	93%	Higher interest and Tobacco Tax Revenue than the planned budget.
Total Appropriations (Net Appropriations*)	8,802,966	5,592,738	64%	Delayed execution of the Baby Bonus program and slow TRISI grant execution
Ending Fund Balance (Ending Reserves*)	11,969,912	13,808,397	115%	Higher interest and Tobacco Tax Revenue than the planned budget paired with delayed execution of the Baby Bonus program.
Total Requirements*(Net Appropriations*+Ending Reserves*)	20,772,878	19,401,135	-7%	
Surplus / (Deficit) (Total Revenues – Net Appropriations*)	(1,539,269)	299,216	-19%	Higher interest and Tobacco Tax Revenue than the planned budget paired with delayed execution of the Baby Bonus program.

REVENUES

- YTD Interest Revenues are \$454K or 112%, that represents a positive variance or 29% higher than YTD Benchmark due to higher interest earning rate (3.5%) than initial projection (2%)
- YTD Tobacco Tax Revenue projections are \$3.761 million or 88%, that represents a positive variance or 5% higher than YTD Benchmark due to the inclusion of Prop 56 Tax revenue disbursement.
- YTD Other Grant Revenue is \$1.457 million or 83%, which is aligned with YTD Benchmark.
- YTD Other Grant Revenue – Baby Bonus Program is \$219K or 27% as the Baby Bonus program launch had been delayed for 2 months.
- YTD Total Revenues projections are \$5.892 million or 81%, that represents a negative variance or 2% lower than YTD Benchmark. Major attributable factors to this net negative variance are associated with delayed execution of the Baby Bonus program and slow execution in various TRISI programs.

APPROPRIATIONS

- YTD Program Expenditures projections are \$4.961 million or 62%, that represents a positive variance or 21% below YTD Benchmark. Major contributions to this positive variance are generally low TRISI program executions and 2-month delayed Baby Bonus Program execution.
- YTD Admin Expenditures of \$631K or 76% that represents a positive variance or 7% below YTD Benchmark. Major contributions to this positive variance are attributable to savings in various Admin Expenses due to staff working in a hybrid format and unfilled staff position.
- **YTD Total Appropriations (Net Appropriations*)** projections are \$5.593 million or 64%, that represents a positive variance or 19% below YTD Benchmark. Major contributions to this positive variance are attributable to 2-month delayed Baby Bonus Program execution, underspending in various TRISI programs and under spending in various Administrative Operation budget lines.

ENDING FUND BALANCE (RESERVES*)

- Currently, we are projecting Ending Fund balance (Reserves*) of \$13.808 million or 115%, that represents a positive variance of 32% or \$1.837 million higher than the planned budget due to higher Interest and Tobacco Tax Revenue paired with delayed execution of the Baby Bonus program, slow TRISI program executions, and saving in various Administrative Operation budget.

CHALLENGES: None at this time.

FIRST 5 SAN MATEO COUNTY

BUDGET MONITORING REPORT AS OF APRIL 30, 2025

YTD benchmark: 83%

	FY24-25 Revised Budget	YTD Actuals as of April 30, 2025	Accruals	YTD Combined Actual & Accrual	YTD Combined vs. FY24-25 Revised Budget (%)
BEGINNING FUND BALANCE (Beginning Reserves*)	13,509,181	13,509,181	0	13,509,181	100%
A. Interest Revenue	405,275	420,032	33,773	453,805	112%
B. Tobacco Tax Revenue	4,275,958	3,048,375	712,660	3,761,035	88%
Tobacco Tax Revenue Fiscal Year Allocations	4,275,958	3,048,375	712,660	3,761,035	88%
C1. Other Grant Revenues	1,755,261	787,064	669,590	1,456,654	83%
C2. Other Grant Revenues- Baby Bonus Program	827,203	110,321	109,068	219,388	27%
TOTAL REVENUES	7,263,697	4,366,863	1,525,091	5,891,954	81%
TOTAL AVAILABLE FUND (Total Sources*)	20,772,878	17,876,044	1,525,091	19,401,135	93%
PROGRAM APPROPRIATIONS					
D1. Strategic Plan Investment - SPIP FY 23-25	3,780,000	2,291,580	315,000	2,606,580	69%
Community Investments (RF, HC, QC & E)	3,180,000	1,970,581	265,000	2,235,581	70%
Evaluation	113,000	111,343	9,417	120,759	107%
Policy, Advocacy, & Communications (PAC) & Emerging Projects	487,000	209,657	40,583	250,241	51%
D2. Strategic Plan Investment - SPIP FY 20-23 - Carry Over	533,319	239,298	37,777	277,075	52%
Community Investments - Healthy Children	159,881	77,205	13,323	90,528	57%
Evaluation	80,000	0	0	0	0%
Policy, Advocacy, & Communications (PAC) & Emerging Projects	293,438	162,093	24,453	186,546	64%
E1. Other Grant Expenditures	1,538,442	689,295	257,537	946,832	62%
E2. Other Grant Expenditures - Baby Bonus Program	797,203	108,177	109,068	267,244	34%
F. Program Operations	1,324,519	855,169	8,496	863,665	65%
Program Shared Operating Budget	220,488	133,979	8,496	142,474	65%
Program Staff S&B & Shared Admin Staff Time	901,634	557,452	0	557,452	62%
Evaluation Staff S&B	202,397	163,739	0	163,739	81%
Total Program Appropriations (D1+D2+E1+E2+F)	7,973,483	4,183,520	727,877	4,961,396	62%
ADMIN APPROPRIATIONS					
G. Admin Shared Operating Budget	220,488	133,979	8,496	142,474	65%
H. Admin Staff S&B	608,995	488,867	0	488,867	80%
Total Admin Appropriations (G+H)	829,483	622,846	8,496	631,342	76%
TOTAL APPROPRIATIONS (Net Appropriations*)	8,802,966	4,806,366	736,373	5,592,738	64%
Surplus / (Deficit) (Total Revenues - Total Appropriations)	(1,539,269)	(439,502)	788,718	299,216	
ENDING FUND BALANCE	11,969,912	13,069,679	788,718	13,808,397	115%
Total S&B	1,713,026	783,661	0	783,661	46%

FIRST 5 SAN MATEO COUNTY

BUDGET MONITORING REPORT AS OF APRIL 30, 2025

YTD benchmark: 83%

	FY24-25 Revised Budget	YTD as of April 30, 2025 Actuals	Accruals	YTD Combined Actual & Accrual	YTD Combined vs. FY24-25 Revised Budget (%)	Notes of Budget Monitoring Report
BEGINNING FUND BALANCE (Beginning Reserves*)	13,509,181	13,509,181	0	13,509,181	100%	
A. Interest Revenue	405,275	420,032	33,773	453,805	112%	\$33K is April interest revenue estimate
B. Tobacco Tax Revenue	4,275,958	3,048,375	712,660	3,761,035	88%	
Tobacco Tax Revenue Fiscal Year Allocations	4,275,958	3,048,375	712,660	3,761,035	88%	\$712K are March and April Tobacco tax revenue estimates
C1. Other Grant Revenues	1,755,261	787,064	669,590	1,456,654	83%	
F5 San Benito IMPACT LEGACY Grant FY23-25	360,672	265,450	30,056	295,506	82%	\$30K is April revenue estimate
F5 San Benito Regional Home Visiting Grant FY23-25	92,000	81,248	7,667	88,915	97%	\$7.6K is April revenue estimate
F5 San Benito IMPACT HUB TA FY23-25	56,489	20,801	4,707	25,508	45%	\$4.7K is April revenue estimate
County of San Mateo BHRS - Mental Health Services MHSA #3 FY23-25	150,000	38,678	75,000	113,678	76%	\$75K is revenue estimate
Peninsula Healthcare District - Help Me Grow SMC CY2024			60,000	60,000		\$12.4K is revenue estimate
Sequoia Healthcare District - Special Needs Grant FY23-25	461,700	139,413	115,425	254,838	55%	\$115K is Q3 revenue estimate
Sequoia Healthcare District - Mental Health Grant FY23-25	134,400	20,832	33,600	54,432	41%	\$33.6K is Q3 revenue estimate
Children and Youth Behavior Health Initiatives - Round 2	500,000		125,000	125,000	25%	\$125K is Q3 revenue estimate
C2. Other Grant Revenues - Baby Bonus Program	827,203	110,321	109,068	219,388	27%	
SMC Health, Family Health Services - Baby Bonus Program	177,203	86,595	59,068	145,663	82%	\$59K aew Q3 & April revenue estimates . WOC Community Health Planner
Health Plan of San Mateo - Baby Bonus Program	500,000			0	0%	
County CEO - Measure K - Baby Bonus Program	50,000			0	0%	
Silicon Valley Community F. - CZI - Baby Bonus Program	50,000	21,581	50,000	71,581	143%	\$50K is April revenue estimate
Sobrato Family Foundation - Baby Bonus Program	50,000			0	0%	
C3. Miscellaneous Revenue		1,072	0	1,072		
Wellness Grant		1,072	0	1,072		
TOTAL REVENUES	7,263,697	4,366,863	1,525,091	5,891,954	81%	Low revenue due to delayed execution of the Baby Bonus Program and slow execution in various TRISI programs.
TOTAL AVAILABLE FUNDS (TOTAL SOURCES*)	20,772,878	17,876,044	1,525,091	19,401,135	93%	Low revenue due to delayed execution of the Baby Bonus Program and slow execution in various TRISI programs.
APPROPRIATIONS						
PROGRAM APPROPRIATIONS						
D1. Strategic Plan Investment - SPIP FY 23-25	3,780,000	2,291,580	315,000	2,606,580	69%	
Resilient Family	1,060,000	801,082	88,333	889,415	84%	\$88K is April expenditure estimate
Healthy Children	1,060,000	526,834	88,333	615,167	58%	Leveraged funding for health initiatives are utilized first
Quality Care and Education	1,060,000	642,665	88,333	730,998	69%	\$88K is April expenditure estimate
Grant Management and Other Evaluation Projects	113,000	111,343	9,417	120,759	107%	\$9.4K is April expenditure estimate
Policy Advocacy, Communications & Systems Change	380,000	209,657	31,667	241,324	64%	Activities related to strategic planning 2025 -2030 learnings, communications campaign, Baby Bonus and other evaluation & research.
Emerging Projects	107,000		8,917	8,917	8%	Spending down SPIP FY20-23 first
D2. Strategic Plan Investment - SPIP FY 20-23 Carry-Over	533,319	239,298	37,777	277,075	52%	Implementation of SPIP FY20-23 Underspending Fund Carry Over in coordination with SPIP FY23-25 in 2-year time frame.
Healthy Children	159,881	77,205	13,323	90,528	57%	\$13.3K is April expenditure estimate
Grant Management and Other Evaluation Projects	80,000			0	0%	\$6.6K is April expenditure estimate
Policy Advocacy, Communications & Systems Change	70,000	3,000	5,833	8,833	13%	\$5.8K is April expenditure estimate
Emerging Projects	223,438	159,093	18,620	177,713	80%	\$18.6K is April expenditure estimate
E1. Other Grant Expenditures	1,538,442	689,295	257,537	946,832	62%	Grant awards through competitive grant applications
F5 San Benito IMPACT LEGACY Grant FY23-25	290,672	206,725	24,223	230,947	79%	\$24K is April expenditure estimate
F5 San Benito Regional Home Visiting Grant FY23-25	54,000	62,730	4,500	67,230	125%	\$4.5K is April expenditure estimate
F5 San Benito IMPACT HUB TA FY23-25	53,520	18,100	4,460	22,560	42%	\$4.5K is April expenditure estimate

	FY24-25 Revised Budget	YTD as of April 30, 2025 Actuals	Accruals	YTD Combined Actual & Accrual	YTD Combined vs. FY24-25 Revised Budget (%)	Notes of Budget Monitoring Report
County of San Mateo BHRS - Mental Health Services MHSA #3 FY23-25	106,250	34,237	8,854	43,091	41%	Some project work is scheduled based on the availability of staff at TRISI organizations, which may result in uneven spending across quarters
Peninsula Healthcare District - Help Me Grow SMC CY2024	50,000	52,096		52,096	104%	
Sequoia Healthcare District - Special Needs Grant FY23-25	400,000	190,477	133,333	323,810	81%	\$133K are Q3 and April expenditure estimates.
Sequoia Healthcare District - Mental Health Grant FY23-25	134,000	16,863	44,667	61,530	46%	Some project work is scheduled based on the availability of staff at TRISI organizations, which may result in uneven spending across quarters
Children and Youth Behavior Health Initiatives - Round 2	450,000	108,068	37,500	145,568	32%	\$37.5K are April expenditure estimates.
E2. Other Grant Expenditures- Baby Bonus Program	797,203	108,177	109,068	267,244	34%	Program launch is delayed 2 months.
SMC Health, Family Health Services Baby Bonus Dividend Program	177,203	86,595	59,068	145,663	82%	Community Health Planner - WOC position
Health Plan of San Mateo - Baby Bonus Program	500,000		50,000	50,000	10%	\$50K is April expenditure estimate. Program launch is delayed 2 months.
County CEO - Measure K - Baby Bonus Program	40,000			0		
Silicon Valley Community F. - CZI - Baby Bonus Program	40,000	21,581		71,581	179%	\$50K is April expenditure estimate
Sobrato Family Foundation - Baby Bonus Program	40,000			0		
F. Program Operations	1,324,519	855,169	8,496	863,665	65%	
Program Shared Operating Budget	220,488	133,979	8,496	142,474	65%	
Program Staff S&B & Shared Admin Staff T	901,634	557,452	0	557,452	62%	Excluding WOC - Community Health Planner position for the Baby Bonus Dividend Program
Evaluation Staff S&B	202,397	163,739	0	163,739	81%	
Total Program Appropriations (D1+D2+D3+E1+E2+F)	7,973,483	4,183,520	727,877	4,961,396	62%	(59,068)
ADMIN APPROPRIATIONS						
G. Admin Shared Operating Budget	220,488	133,979	8,496	142,474	65%	
H. Admin Staff S&B	608,995	488,867	0	488,867	80%	
Total Administrative Appropriations	829,483	622,846	8,496	631,342	76%	
Administrative Cost Rate %	9%	13%		11%		
TOTAL APPROPRIATIONS (NET APPROPRIATIONS*)	8,802,966	4,806,366	736,373	5,592,738	64%	
ENDING FUND BALANCE (ENDING RESERVES*)	11,969,912	13,069,679	788,718	13,808,397	115%	

Color Coding

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

Schedule 1- OPERATING BUDGET MONITORING REPORT AS OF 4.30.2025

YTD benchmark: 83%

	ORG / ACCT#	FY24-25 Revised Budget	YTD Actuals as of April 30, 2025	Accruals	YTD Combined Actual & Accrual	YTD Combined vs. FY24-25 Revised Budget (%)	Notes of Budget Monitoring Report
I. Services and Supplies							
Outside Printing & Copy Svc	19510-5191	2,000		0	0	0%	
General Office Supplies	19510-5193	8,000	3,280		3,280	41%	combined 5866, 5193
Photocopy Lease & Usage	19510-5196	5,000	872	0	872	17%	
Direct Communication Expenses	19510-5132	3,800	1,108	0	1,108	29%	
Computer Supplies	19510-5211	25,000	2,185	0	2,185	9%	
Software License /Maintenance Expenses	19510-5215	6,673	4,420	0	4,420	66%	
County Memberships - (e.g. F5 Assn Dues)	19510-5331	15,000	15,270	0	15,270	102%	
Auto Allowance	19510-5712	11,000	8,966	0	8,966	82%	
Meetings & Conference Expense	19510-5721	8,000	5,599	0	5,599	70%	
Commissioners Meetings & Conference Exp	19510-5723	5,000	1,511	0	1,511	30%	
Other Business Travel Expense	19510-5724	8,000	2,472	0	2,472	31%	combined 5713, 5714, 5717, 5722, 57
Dept. Employee Training Expense	19510-5731	5,327	2,949	0	2,949	55%	combined 5332 and 5731
Wellness grant	19510-5856	0	317	0	317		
Other Professional Services	19510-5858	27,500	6,624	0	6,624	24%	
Sub Total - Services & Supplies		130,300	55,572	-	55,572	43%	
II. Other Charges							
Automation Services - ISD	19510-6713	46,854	26,585	0	26,585	57%	
Annual Facilities Lease	19510-6716	109,000	87,223	7,896	95,119	87%	Rent escalation for operation services.
General Liability Insurance	19510-6725	19,090	15,908		15,908	83%	Insurance increases
Official Bond Insurance	19510-6727	319	266		266	83%	
Human Resources Services	19510-6733	323	323		323	100%	
Countywide Security Services	19510-6738	692	692		692	100%	
All Other Service Charges	19510-6739	60,210	25,660	3,000	28,660	48%	\$3K are March and April expenditure e
Card Key Services	19510-6751	1,042	868		868	83%	
A-87 Expense	19510-6821	73,146	54,860	6,096	60,955	83%	\$17K is April expenditure estimate
Sub Total - Other Charges		310,676	212,385	16,992	229,376	74%	
Total Operating Budget		440,976	267,957	16,992	284,949	65%	
Program Shared Operating Budget		220,488	133,979	8,496	142,474	65%	
Admin Shared Operating Budget		220,488	133,979	8,496	142,474	65%	

Schedule 2 - SALARIES & BENEFITS BUDGET MONITORING REPORT AS OF 4.30.2025

Program Staff & Shared Admin Staff	901,634	557,452	557,452	62%	Including 27% of Admin cost allocation; vacancy is not filled
Evaluation Staff	202,397	163,739	163,739	81%	
Admin Staff	608,995	488,867	488,867	80%	
F5SMC Salaries and Benefits	\$ 1,713,026	\$ 1,210,058	\$ - \$ 1,210,058	71%	
Baby Bonus Dividend Program - WOC	\$ 177,203	\$ 142,402	142,402	80%	Other Grant Appropriations

Shared Budget/Shared Cost

Revenue ; Fund Balance

Appropriations

Salaries & Benefits