

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

DATE: Monday, October 26, 2026

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/91317809806>
Phone: +1 669 900 6833, Webinar ID: 913 1780 9806

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 located at 101 Twin Dolphin Drive, 1st Floor Conference Room, Redwood City, CA 94065 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, Candice Saadian at csaadian@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 October 26, 2026, 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: First 5 Work/Impact: Partnership to Distribute Immigration Enforcement Response Materials to Child Care Providers Shared by Gladys Reyes, Community Programs Manager, Child Care Coordinating Council and Emily Roberts, Strategic Initiatives Manager, First 5 San Mateo County	4:10 PM
Discussion Items		
6	Presentation: Statutory Framework: Proposition 10 and First 5 Commissions Shared by Candice Saadian, Deputy County Attorney, County Attorney's Office, County of San Mateo <i>(See Attachment 6)</i>	4:20 PM
7	Presentation: First 5 San Mateo County Future Changes in Administrative Structure Shared by Mike Callagy, County Executive Officer, County of San Mateo	4:35 PM
Action Items		
8	Approval of Formation of Ad Hoc Committee for First 5 San Mateo County Administrative and Infrastructure Transition Planning Shared by Claire Cunningham, Commission Chair, First 5 San Mateo County and Director, Human Services Agency <i>(See Attachment 8)</i>	4:55 PM
9	Approval of the First 5 San Mateo County FY 2025 – 2026 Budget Close Out Shared by Michelle Blakely, Interim Executive Director, First 5 San Mateo County <i>(See Attachment 9)</i>	5:00 PM
10	Presentation and Approval of First 5 San Mateo County's FY 2025 – 2026 Annual Report to the State and Submission to First 5 California Shared by Jenifer Clark, Research and Evaluation Specialist, First 5 San Mateo County <i>(See Attachment 10)</i>	5:05 PM
Discussion Item		
11	Presentation: First 5 San Mateo County FY 2025 -2026 Accomplishments Shared by Michelle Blakely, Interim Executive Director, First 5 San Mateo County	5:25 PM
Informational Items		
12	Report of the First 5 San Mateo County Staff Team Shared by Michelle Blakely, Interim Executive Director, First 5 San Mateo County <i>(See Attachment 12)</i>	5:45 PM

13	Committee Updates (See Attachment 13)	5:55 PM
14	Adjournment	6:00 PM

Public Participation: The October 26, 2026, First 5 San Mateo County Commission meeting may be accessed through Zoom link at the top of this agenda. The October 26, 2026, 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/99622266925>). Members of the public can also attend this meeting physically in the **San Mateo County Office of Education located at 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 Myra Cruz, Contract Administrator / Operations Coordinator, as early as possible but no later than 10 a.m. on Friday, October 23, 2026, 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, October 23, 2026, 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, October 23, 2026, 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 read aloud 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 October 26, 2026 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 application 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 when 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

October 26, 2026

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 July 27, 2026 Commission Meeting Minutes
(See Attachment 3.1)

First 5 San Mateo County (F5SMC)
COMMISSION MEETING MINUTES
July 27, 2026

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, Naveen Mahmood

Absent: Marco Chavez, Hanish Rathod, Nkia Richardson, Jackie Speier
Adele Ryono (YC)

Staff: Kitty Lopez, Michelle Blakely, Khanh Chau, Emily Roberts
(online), Mai Le, Myra Cruz, Mey Winata

County Attorney: Judith Holiber

Commission Chair Cunningham called the meeting order at 4:05 PM; roll call was taken.
The meeting was held in-person for all Commissioners and 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 June 27, 2026, Meeting and Approve Consent Agenda Items:

MOTION: BORAGNO / SECOND: ESPINOZA

AYES: BORAGNO, CUNNINGHAM, CHAWLA, ESPINOZA, MAHMOOD

NOES: NONE

ABSTAIN: NONE

Motion approved.

Public Comments: None

4. Commission Announcements: None

5. **Storytelling: First 5 Work/Impact: All Five**

Lena Pressesky, Development Director and Omi Lindsey, Executive Director shared that All Five held a July 11 open house to celebrate 10 years of service, recognize families, staff, donors, and partners, and introduce the program to prospective families. The event highlighted All Five's outdoor learning, child-centered play, community partnerships, and socioeconomic diversity model serving both full-paying and subsidized families.

The two-hour Saturday event drew 113 guests—69 registered through Eventbrite and 44 walk-ins—following outreach through neighborhood flyers, social media, and Eventbrite. Attendees included many local families, including residents of the Belvedere neighborhood.

First 5 funding supported teacher participation and a family vendor who prepared pancakes, creating an additional income opportunity. Eight community service providers also attended, connecting families to available resources. Pressesky reported the event was successful and thanked First 5 for its support. The presentation included photographs of the event and promotional materials displayed at the site.

Public Comments: None

The PowerPoint Presentation can be found on the F5SMC's website, [July 27, 2026 Commission Meeting Presentations](#).

6. **Storytelling and Recognition: First 5 Work/Impact and Kitty Lopez, Executive Director, Retirement**

Michelle Blakely, F5SMC's Deputy Director, conveyed gratitude to Kitty Lopez and shared a quote from Dr. Jane Goodall. The Commission also recognized Kitty with a plaque and flowers in appreciation of her 13 years of dedicated service to First 5 San Mateo County. Commissioners commended her intentional, mission-driven leadership; integrity; mentorship; and steadfast commitment to advancing positive outcomes for young children, families, and the community. Commissioners shared personal reflections and expressed heartfelt gratitude for her lasting impact on First 5 San Mateo County and her unwavering commitment to doing what is best for children and families across the county.

Kitty Lopez thanked the Commission and attendees for their support, leadership, and contributions to the work of First 5 San Mateo County. Lopez expressed confidence that the work would continue through the dedication of those present and emphasized that every role plays an important part in advancing the mission.

Public Comments:

Roseanne Foust, President and CEO of SAMCERA and former First 5 SMC Commissioner, Dow-Jane Pei, Program and Operations Manager of Build Up San Mateo County, and Soodie Ansari, Program Manager, Early Learning Dual Language Support, San Mateo County Office of Education (SMCOE) and Andrea Burnett, Program Manager, P-3 Quality Improvement Initiatives, SMCOE, and Marchelle Moten, Executive Director, P-3 Early Education Services shared reflections on their experiences working with Kitty and expressed appreciation for her leadership.

7. Recommendation by F5SMC Staff and Proposal Review Panel to Commission for Approval of Award Totaling Up to \$330,000 to S. Groner Associates for Communications Consultation Services with a Proposed Term of August 1, 2026, to June 30, 2028, and Direction to Staff to Conduct Contract Negotiations and Contract Execution Regarding Same

Mai le, Community Health Planner, shared an overview of the funding purpose, relevant background information, and the procurement process, noting that six proposals were received through OpenGov. The review panel selected and recommended S. Groner Associates. Le also shared work samples from S. Groner Associates and noted that the firm has worked with First 5 Santa Clara.

MOTION: ESPINOZA / SECOND: MAHMOOD
 AYES: BORAGNO, CUNNINGHAM, CHAWLA, ESPINOZA, MAHMOOD
 NOES: NONE
 ABSTAIN: NONE

Motion approved.

Public Comments: None

The PowerPoint Presentation can be found on the F5SMC's website, [July 27, 2026 Commission Meeting Presentations](#).

8. Approval of Amendment to the Contract Agreement with Sarah Dobkin LCSW for the First 5 San Mateo County Children and Youth Behavioral Health Initiative Round 2 Grant: Infant and Early Childhood Mental Health Network Manager to increase the total amount by \$40,000 for a new total obligation not to exceed \$168,250 and to extend the term from July 1, 2024 through June 30, 2027.

Kitty Lopez shared a brief background on the agenda item and requested approval.

MOTION: BORAGNO / SECOND: CHAWLA
 AYES: BORAGNO, CUNNINGHAM, CHAWLA, ESPINOZA, MAHMOOD
 NOES: NONE
 ABSTAIN: NONE

Motion approved.

Public Comments: None

9. Approval of an Amendment of Agreement with San Mateo County Office of Education for Quality Supports in Early Learning Settings-F5CA IMPACT Legacy for an increased amount of \$261,604.80 total not to exceed \$523,209.60 and IMPACT Hub for an increased amount of \$48, 205.56 not to exceed \$96,411.12 and extend the terms from July 1, 2025 through June 30, 2027.

Kitty Lopez shared a brief background on the agenda item and requested approval.

MOTION: CHAWLA / SECOND: ESPINOZA
 AYES: BORAGNO, CUNNINGHAM, CHAWLA, ESPINOZA, MAHMOOD
 NOES: NONE
 ABSTAIN: NONE

Motion approved.

Public Comments: None

10. Approval of Medi-Cal Plan Revenue Growth Contract by Authorizing the Executive Director to negotiate, execute, and amend an agreement between First 5 SMC and Sellers Dorsey to design, seek state and federal approval for, and implement a Managed Care Incentive Payment Program under a performance-based, no-risk fee structure in which First 5 SMC pays a performance fee only if program successfully generates net revenue

Kitty Lopez shared that a proposed performance-based partnership with Sellers Dorsey to explore a Medi-Cal managed care incentive program that could generate additional federal matching funds for First 5 investments in maternal and child health. The agreement includes no-risk safeguards, including no payment unless outcomes are achieved and the ability to terminate the agreement if it is not successful or financially beneficial. Lopez added that participation in the eight-county cohort would allow First 5 commissions to share information, coordinate around similar outcome measures, and learn from one another. If successful, the initiative could serve as a model for other First 5 commissions throughout

California. Lopez also acknowledged Commissioner Chawla and County Counsel Saadian for participating in meetings with Sellers Dorsey to further develop the proposals.

Commission asked questions.

MOTION: CHAWLA / SECOND: BORAGNO
AYES: BORAGNO, CUNNINGHAM, CHAWLA, ESPINOZA, MAHMOOD
NOES: NONE
ABSTAIN: NONE

Motion approved.

Public Comments: None

The PowerPoint slide can be found on the F5SMC's website, [July 27, 2026 Commission Meeting Presentations](#).

11. Appointment of Michelle Blakely, Deputy Director, to Interim Executive Director, upon retirement of Kitty Lopez, current Executive Director, on August 28, 2026

F5SMC Commission Chair Cunningham shared that the recruitment for a permanent Executive Director had been temporarily paused to allow the Commission to evaluate First 5 San Mateo County's organizational structure and assess the potential impact of declining Proposition 10 revenues. The pause would continue for a short period. To ensure continued leadership during the transition, staff recommended elevating Deputy Director Michelle Blakely to Interim Executive Director effective August 20, 2026, upon Lopez's retirement.

MOTION: CHAWLA / SECOND: MAHMOOD
AYES: BORAGNO, CUNNINGHAM, CHAWLA, ESPINOZA, MAHMOOD
NOES: NONE
ABSTAIN: NONE

Motion approved.

Public Comments:

Dow-Jane Pei shared reflection on working with Michelle, particularly highlighting her contributions to the Build Up San Mateo County initiative.

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

Kitty Lopez, F5SMC's Executive Director, shared that the F5SMC Team Report is in the packet and highlighted the following:

- Healthy Families: First 5 San Mateo County partnered with the Bay Area and Child Care Coordinating Council of San Mateo County to distribute immigration-related resources to nearly 800 child care providers. The effort was well received and made possible through the Mental Health Services Act grant, demonstrating effective collaboration among community partners.
- Resilient Families: On June 17 and July 21, First 5 hosted the second in-person sessions for five grantees providing early childhood mental health services. The sessions focused on sharing information and providing technical assistance on potential sustainable funding sources to support early childhood mental health activities.
- First 5 California and First 5 Association Updates: The report included an update on the appointment of an Acting Executive Director for First 5 California.

13. Adjournment: The meeting was adjourned at 5:01 pm

Date: October 26, 2026
To: First 5 San Mateo County Commission
From: Michelle Blakely, Interim Executive Director
Re: Presentation: Statutory Framework: Proposition 10 and First 5 Commissions

ACTION REQUESTED

FYI Only

BACKGROUND

Deputy County Counsel Candice Saadian will be presenting this agenda item at the October 26, 2026, Commission Meeting. **See Attachment 6.1** for background information.

FISCAL IMPACT

None



COUNTY OF SAN MATEO

OFFICE OF THE COUNTY ATTORNEY

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COUNTY ATTORNEY

JOHN D. NIBBELIN

MEMORANDUM

From: Candice Saadian, Deputy County Attorney

Subject: Administrative Placement of First 5 San Mateo County within San Mateo County Health

Date: October 26, 2026

1. Purpose and Summary

This memorandum evaluates the legal and governance implications of the proposed administrative placement of First 5 San Mateo County (“F5SMC” or the “Commission”) within San Mateo County Health (“Health”), including the extent to which the County and Health may exercise authority over F5SMC’s Proposition 10 funds and Strategic Plan.

In summary, the proposed administrative restructuring is legally permissible, but it would not, by itself, transfer the Commission’s statutory authority to the County or Health. Proposition 10 assigns county First 5 commissions responsibility for their local strategic plans and local trust funds. San Mateo County has established F5SMC as a county agency with independent authority over those matters, as authorized by Health and Safety Code section 130140.1.

The County may consolidate administrative functions and provide Health infrastructure while preserving the Commission’s statutory responsibilities. Any proposed transfer of decision-making authority concerning Proposition 10 funds or the Strategic Plan should be evaluated for consistency with Proposition 10. Responsibility for other operational matters, including budgeting, contracting, and personnel administration, should be clearly defined in the documents implementing the restructuring and should remain consistent with applicable law.

2. Statutory Framework: Proposition 10 and First 5 Commissions

The California Children and Families First Act of 1998 (“Proposition 10”) established California’s First 5 system to promote early childhood development from the prenatal stage through age five, encompassing childcare, health care, social services, education, and related purposes. County commissions have substantial discretion to address local needs, but that discretion operates within Proposition 10’s statutory purposes and through each commission’s local strategic planning process.

A central feature of Proposition 10 is local decision-making. Rather than providing counties an unrestricted revenue source, Proposition 10 directs funds according to each county’s

birth rate, to each county. These revenues are to be allocated to county commissions and deposited into each county's Children and Families Trust Fund, to be expended for purposes authorized by the Act and consistent with the county's approved strategic plan. This structure is directly relevant to the proposed reorganization: F5SMC's status as a county agency does not convert Proposition 10 funds into general County revenue that Health may allocate according to its own priorities.

3. Matters That Remain Within the Commission's Authority

The distinction between administrative placement and statutory authority should be maintained throughout the restructuring. Health may provide administrative infrastructure and support, provided the arrangement preserves the authority assigned to the Commission by Proposition 10. The principal areas requiring attention are described below.

Proposition 10 Funds and the Local Trust Fund.

Proposition 10 revenues are allocated to the Local Trust Fund and must be used for purposes authorized by the Act and consistent with the Strategic Plan. Administrative placement of F5SMC within Health would not, on its own, authorize Health to redirect those funds, including to a Health program serving children. Expenditures must remain consistent with Proposition 10 and the Commission's approved Strategic Plan.

Strategic Plan.

Health and Safety Code section 130140 assigns the Commission responsibility for adopting, and at least annually reviewing and revising, the Strategic Plan following a public hearing. Changes to the Strategic Plan therefore require Commission action. The County Executive and Health may recommend changes, communicate County priorities, request analysis, or provide other administrative and policy support, while final adoption remains a Commission function under Proposition 10.

Budget and Funding Allocations.

Health may assist with budget preparation, financial analysis, accounting, and other fiscal administration. Decisions concerning the allocation and expenditure of Proposition 10 funds must remain consistent with the Commission's statutory authority over the Local Trust Fund and Strategic Plan. The restructuring documents should clearly identify the respective roles of the Commission, Health, and other County offices in developing, reviewing, approving, and administering the F5SMC budget.

Contracts.

Health's procurement staff may provide administrative assistance in processing contracts that support F5SMC programs and operations. The restructuring documents should specify applicable approval and signature authority and should distinguish administrative processing from decisions concerning the allocation of Proposition 10 funds. Any engagement funded with F5SMC

resources, including a Strategic Plan consultant, must be consistent with Proposition 10, the approved Strategic Plan, and otherwise applicable County contracting requirements.

Personnel.

The proposed restructuring should clearly address the employment status, supervision, evaluation, and reporting relationships of the Executive Director and other F5SMC personnel. If F5SMC employees will become Health employees, rather than remain assigned to F5SMC while receiving administrative services from Health, the County should separately evaluate the legal, labor, and operational implications of that change. The resulting personnel structure should be documented and aligned with the Commission's statutory responsibilities.

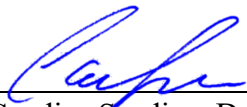
4. Conclusion

Proposition 10 permits F5SMC to operate as a county agency while retaining independent authority over its Strategic Plan and Local Trust Fund. The proposed administrative placement of F5SMC within Health may be implemented consistently with that structure if the arrangement preserves the Commission's statutory authority. The County may consolidate administrative functions, provide Health infrastructure and support, and offer strategic recommendations. The documents implementing the restructuring should clearly allocate responsibility for budgeting, contracting, personnel, and other operational matters, while preserving the Commission's authority over the Local Trust Fund and Strategic Plan as required by Proposition 10.

Very truly yours,

JOHN D. NIBBELIN, COUNTY ATTORNEY

By: _____


Candice Saadian, Deputy

JDN:CS/pc

Date: October 26, 2026
To: First 5 San Mateo County Commission
From: Claire Cunningham, Commission Chair
Re: Approval of Formation of Ad Hoc Committee for First 5 San Mateo County Administrative and Infrastructure Transition Planning

ACTION REQUESTED

Approval of Formation of Ad Hoc Committee for First 5 San Mateo County Administrative and Infrastructure Transition Planning

BACKGROUND

On September 29, 2026, the First 5 San Mateo County Commission received notification from the County Executive's Office that, due to declining tobacco tax revenue, First 5 San Mateo County will transition under San Mateo County Health, Family Health Services effective January 1, 2027.

Given the range of factors that must be considered, the Commission should establish an Ad Hoc Committee consisting of no more than four Commissioners. The committee will serve as a workgroup with the San Mateo County Human Resources Department, Family Health Services, other relevant County departments, and First 5 staff leadership to assess administrative structure options, develop a transition timeline, and make recommendations to the Commission.

The Commission Chair shall appoint Commissioners to serve on the Ad Hoc Committee for First 5 San Mateo County Administrative and Infrastructure Transition Planning. The Committee shall remain in existence for the period it determines is necessary to complete its work.

FISCAL IMPACT

None

RECOMMENDATION

Approval of Formation of Ad Hoc Committee for First 5 San Mateo County Administrative and Infrastructure Transition Planning

DATE: October 26, 2026
TO: First 5 San Mateo County Commission
FROM: Michelle Blakely, Interim Executive Director
RE: Approval of F5SMC FY 2025-26 Budget Close-Out as of June 30, 2026

ACTION REQUESTED

Approval of F5SMC FY 2025-26 Budget Close-Out as of June 30, 2026

BACKGROUND

- At the May 19, 2025 Commission Meeting, Commission approved F5SMC FY 2025-26 Budget.
- At the February 23, 2026 Commission Meeting, Commission approved F5SMC FY 2025-26 Revised Budget.
- At the October 19, 2026 Finance and Administration Committee Meeting, Finance and Administration Committee members reviewed and endorsed the approval of F5SMC FY 2025-26 Budget Close Out as of June 30, 2026.
- Please read this Budget Close Out Memo in conjunction with Attachments 9A, 9B, and 9C.

ECONOMIC FACTORS OF FY 2025-26 BUDGET CLOSE OUT PERFORMANCE

Overview & Revenue Diversification

First 5 San Mateo County operates through **two primary funding streams: Tobacco Tax Revenues** (Proposition 10 allocations) and **Other Grant Fundings**. The agency continues to actively leverage external funding opportunities to acquire new grants and reduce financial dependency on Tobacco Tax Revenues.

This strategy has significantly shifted the agency's financial structure over recent years. At the end of **FY 2025–26**, **50%** budget execution is funded by **Tobacco Tax Revenues** and **Other Grants now account for 50%** of budget execution; whereas comparing with **FY 2020–21**, **80%** budget execution was funded by **Tobacco Tax Revenue while Other Grants accounted for 20%** of budget execution.

Funding Strategy: The trend of **leveraging external Other Grant fundings** will continue into future years. These leveraged funds are utilized as braided funding alongside mainstream Tobacco Tax revenue to directly support First 5's Strategic Plan Implementation Plan (SPIP) investment strategies.

Strategic Plan Implementation Plan SPIP FY 2025-28 and Key Other Grants

Fiscal Year 2025–26 marks the first year of Phase One. Most grants and programs under Phase One are 3-year term agreements **braided fundings from both Tobacco Tax Revenues and Other Grant fundings. A total of \$1,588 million in braided funding** from the Mental Health Service Act MHSA grant, the Integrated System Children with Special Needs grant, and the Trauma Informed System Initiatives TRISI grant **supported 14 agreements under the SPIP FY 25–28 contract cycle.**

Key Other Grants

In its strategic direction, First 5 continues to acquire and **execute seven (7) Other Grants** (non-Baby Bonus program) utilizing as **braided fundings** during the fiscal year. These Other Grants are recurrence multiple-year funding through FY 2027-28. First 5 achieved full execution of a \$1 million Mental Health Services Act (MHSA) grant during the fiscal year, bolstering regional mental health support for young children and families.

In addition, First 5 continues execute the **Baby Bonus program**, a 4.5-year Guaranteed Basic Income (GBI) pilot project offer unconditional cash assistance of \$300 per month for 36 months to target eligible parents of newborns. The Baby Bonus Project is fully supported and funded by philanthropic and public funding from partners including Health Plan of San Mateo (HPSM), San Mateo County Health and Family Services, San Mateo County (Measure K), Peninsula Healthcare District, Sequoia Healthcare District, Silicon Valley Community Foundation (CZI), Sobrato Family Foundation, and Jackie Speier Foundation.

Service Delivery & Community Challenges

Service Delivery Models

First 5 San Mateo County and its funded partners continue to evaluate and optimize service delivery models. While virtual platforms remain effective, Grantees and Community-Based Organizations (CBOs) are gradually shifting from hybrid approaches as community demand for in-person services continues to increase.

F5's budget performance was also impacted by workforce challenges at community-based organizations (CBOs). Factors such as high living costs, burnout, and staff retention issues across both low-wage and professional early childhood sectors contributed to some delayed grant executions throughout the fiscal year.

Budget Performance & Financial Summary

Overall, the agency executed approximately **75% of its Total Appropriation Budget**. Considering the complex post-pandemic recovery environment, evolving policy landscapes, and the simultaneous execution of a three-tiered budget—encompassing Phase One of SPIP FY 2025–28, Other Grant administration, and the multi-year Baby Bonus Project—attaining a 75% execution rate represents a major accomplishment.

FY 2025-26 BUDGET CLOSE-OUT as of June 30, 2026 SUMMARY

	FY25-26 Revised Budget	FY25-26 Budget Close Out	FY25-26 Budget Close Out (+/-) vs. FY25-26 Revised Budget (\$)	FY25-26 Budget Close Out (+/-) vs. FY25-26 Revised Budget (%)	Notes of FY 2025-26 Budget Close Out
Beginning Fund Balance (Beginning Reserves*)	13,395,495	13,395,495	0	100%	
Total Revenues	7,557,253	7,329,811	(227,442)	97%	Overall Total Revenue performance —reaching 97% of total planned budget —was primarily driven by higher Interest earnings and increased Tobacco Tax disbursements, which were partially offset

Attachment 9

					by a slower pace of parent enrollment in the Baby Bonus Program.
Total Available Fund (Total Sources*)	20,952,748	20,725,306	(227,442)	99%	Ditto
Total Appropriations (Net Appropriations*)	8,493,454	6,330,579	(2,162,875)	75%	Total Appropriations achieved a 75% budget execution rate . This performance was primarily driven by the full execution of a \$1M MHSA grant used as braided funding across SPIP community investment contracts. These gains were partially offset by slower initial SPIP program execution at the start of the new funding cycle—as spending was prioritized to exhaust the one-year MHSA grant—alongside lower execution in the Baby Bonus Program and savings from vacant positions.
Ending Fund Balance (Ending Reserves*)	12,459,294	14,394,727	1,935,433	116%	The 116% Ending Fund Balance was primarily driven by higher Interest Revenue and increased Tobacco Tax disbursements, alongside the full execution of a \$1M MHSA grant utilized as leveraged funding across 14 SPIP community investment contracts. These positive factors were partially offset by a slower SPIP rollout at the start of the new funding cycle (prioritizing the spend-down of the one-year MHSA grant), lower execution in the Baby Bonus Program, and savings from vacant positions.
Total Requirements*(Net Appropriations*+Ending Reserves*)	20,952,748	20,725,306	(227,442)	99%	Ditto
Surplus / (Deficit) (Total Revenues – Net Appropriations*)	(936,201)	999,232	1,935,433	-107%	Budget Close-Out: The \$999K surplus was primarily driven by higher Interest earnings and Tobacco Tax disbursements, combined with underspending in the SPIP and Baby Bonus programs, alongside cost savings from unfilled vacant positions.

FY 2025-26 BUDGET CLOSE-OUT as of June 30, 2026 HIGHLIGHTS

The FY 2025-26 Budget Close-Out as of June 30, 2026 is presented in detail in **Attachment 9A, 9B, and 9C** with key highlights presented in the table below:

REVENUE

- **Interest Revenue:** Generated **\$723K**, achieving an 80% positive variance (**\$321K** above the planned budget) driven by higher interest-earning rates within the County investment pool.
- **Tobacco Tax Revenue:** Generated **\$3.651M**, representing a 7% positive variance (**\$239K** above the planned budget) driven by higher-than-projected revenue disbursements compared to the most recent five-year Tobacco Tax Revenue projection.
- **Other Grant Revenues (Non-Baby Bonus):** Totalling **\$2.125M**, this category experienced a 14% negative variance (**\$344K** below budget) as the agency fully executed the **\$1M MHSA grant** ahead of its June 30, 2026 expiration, alongside two new Other Grants executed for only three quarters.

- **Other Grant Revenue (Baby Bonus Program):** Totaling **\$929K**, this category experienced a 35% negative variance (**\$443K** below the planned budget) due to parent enrollment progressing at a slower pace than anticipated.
- **Total Actual Revenue:** Reached **\$7.330M**, coming in roughly 3% (**\$226K** below the planned budget). This variance reflects the net effect of stronger Interest and Tobacco Tax revenues partially offsetting slower execution in the Baby Bonus program.

EXPENDITURES

- **Program Expenditures:** Totaling **\$5.541M**, this category achieved a 72% budget execution (\$2.111M underspend). This was primarily driven by the full execution of a \$1M MHSA grant paired with six Other Grants—*Impact Legacy, Impact Hub, Integrated System for Children with Special Needs, Trauma-Informed System Initiatives, Children and Youth Behavioral Health Initiatives, and Help Me Grow Call Centers*—utilized as **braided funding across 14 SPIP community investment contracts**. These gains were partially offset by a slower initial SPIP rollout as spending focused on the one-year MHSA grant, slower SPIP program execution as the new funding cycle began (SPIP spending is anticipated to increase in subsequent fiscal years leading up to the MHSA grant expiration on June 30, 2026), and slower Baby Bonus program execution, and vacancy savings.
 - ✓ **SPIP FY 2025–28: \$1.181M** (64% budget execution or \$661K underspend), as (a) spending was prioritized on the one-year MHSA grant, (b) alongside a three-quarter execution window for two key legacy programs with amendments through October 31, 2025, and (c) an initial slower program execution as the new funding cycle began. SPIP spending is anticipated to increase in subsequent fiscal years leading up to the MHSA grant expiration on June 30, 2026.
 - ✓ **SPIP FY 2023–25: \$583K** (73% budget execution or \$216K underspend). These funds supported two key legacy programs through their final phases of execution (amendments ending October 31, 2025) while facilitating planning and contracting for emergent project investments in coordination with 3-year funding cycle SPIP FY 2025–28.
 - ✓ **Other Grants (Non-Baby Bonus): \$1.827M** (78% of budget execution or \$521K underspend). This was primarily driven by the full execution of a \$1M MHSA grant paired with six Other Grants—*Impact Legacy, Impact Hub, Integrated System for Children with Special Needs, Trauma-Informed System Initiatives, Children and Youth Behavioral Health Initiatives, and Help Me Grow Call Centers*—utilized as **braided funding across 14 SPIP community investment contracts**, alongside with two out of seven new grants billing for only three quarters as new grant funding award began.
 - ✓ **Other Grants (Baby Bonus Program): \$828K** (65% of budget execution or \$443K underspend) due to a slower-than-projected parent enrollment pace.
 - ✓ **Program Operations: \$1.121M** (81% budget execution or \$269K underspend) as savings from various operation budget lines as staff working hybrid format and from vacant position.
- **Administrative Expenditures:** Totaling **\$789K**, this category achieved **94% budget execution** (\$52K underspend) primarily driven by underspending across various Service and Supplies budget areas due to staff operating in a hybrid work format, alongside partial savings from vacant positions.

- **Total Expenditures of \$6.330 M** achieved a **75% budget execution rate** (\$2.163 M underspend). This performance was primarily driven by the full execution of a \$1M MHSA grant used as braided funding across 14 SPIP community investment contracts. These gains were partially offset by a slower initial SPIP rollout as spending focused on the one-year MHSA grant, slower SPIP program execution as the new funding cycle began (SPIP spending is anticipated to increase in subsequent fiscal years leading up to the MHSA grant expiration on June 30, 2026), and slower Baby Bonus program execution, and vacancy savings.

ENDING FUND BALANCE

- **FY 2025-26 Budget Closeout Ending Fund Balance of \$14.394 M** represents **16% positive variance** or \$1.936 M higher than the Revised Budget and a **Budget Close Out Surplus of \$999K**.

Key Drivers: The **16% higher Ending Fund Balance** was primarily driven by higher Interest Revenue and increased Tobacco Tax disbursements, alongside the full execution of a \$1M MHSA grant utilized as braided funding across SPIP community investment contracts. These positive factors were partially offset by a slower SPIP rollout at the start of the new funding cycle (prioritizing the spend-down of the one-year MHSA grant), lower execution in the Baby Bonus Program, and savings from vacant positions.

FISCAL IMPACT

- Admin Cost rate of 12% is within the Commission's approved Admin Cost Rate Policy of 15%.

ACTION REQUESTED

Approval of F5SMC FY 2025-26 Budget Close-Out as of June 30, 2026.

FIRST 5 SAN MATEO COUNTY

FY 2025-26 BUDGET CLOSE OUT SUMMARY

	FY25-26 Revised Budget	FY25-26 Budget Close Out	FY25-26 Budget Close Out (+/-) vs. FY25-26 Revised Budget (\$)	FY25-26 Budget Close Out (+/-) vs. FY25-26 Revised Budget (%)
BEGINNING FUND BALANCE (Beginning Reserves*)	13,395,495	13,395,495	0	100%
A. Interest Revenue	401,865	723,303	321,438	180%
B. Tobacco Tax Revenue	3,412,446	3,651,309	238,863	107%
Tobacco Tax Revenue Fiscal Year Allocations	3,412,446	3,651,309	238,863	107%
C1. Other Grant Revenues - Non Baby Bonus Program	2,469,597	2,125,171	(344,426)	86%
C2. Other Grant Revenues- Baby Bonus Program	1,272,273	828,956	(443,317)	65%
TOTAL REVENUES	7,557,253	7,329,811	(227,442)	97%
TOTAL AVAILABLE FUND (Total Sources*)	20,952,748	20,725,306	(227,442)	99%
PROGRAM APPROPRIATIONS				
D1. Strategic Plan Investment - SPIP FY 25-28	1,841,968	1,181,025	(660,942)	64%
Resilient Family	366,786	176,414	(190,372)	48%
Healthy Children	858,081	438,508	(419,573)	51%
Quality Care and Education	267,000	192,407	(74,593)	72%
Grant Management and Other Evaluation Projects	90,101	130,400	40,299	145%
Policy Advocacy, Communications & Systems Change	260,000	243,297	(16,703)	94%
D2. Strategic Plan Investment - SPIP FY 23-25 Carry Over	800,000	583,947	(216,053)	73%
Community Investments (RF, HC, QC & E)	635,080	532,612	(102,468)	84%
Evaluation	58,544	13,500	(45,044)	23%
Policy Advocacy, Communications & Systems Change	106,376	37,835	(68,541)	36%
E1. Other Grant Appropriations - Non Baby Bonus Program	2,347,710	1,826,811	(520,899)	78%
E2. Other Grant Appropriations - Baby Bonus Program	1,272,273	828,856	(443,417)	65%
F. Program Operations	1,390,226	1,120,737	(269,489)	81%
Program Shared Operating Budget	210,050	172,438	(37,612)	82%
Program Staff S&B & Shared Admin Staff Time	966,830	740,740	(226,090)	77%
Evaluation Staff S&B	213,346	207,559	(5,787)	97%
Total Program Appropriations (D1+D2+D3+E1+E2+F)	7,652,177	5,541,377	(2,110,800)	72%
ADMIN APPROPRIATIONS				
G. Admin Shared Operating Budget	210,050	172,438	(37,612)	82%
H. Admin Staff S&B	631,226	616,764	(14,462)	98%
Total Admin Appropriations (G+H)	841,276	789,202	(52,074)	94%
TOTAL APPROPRIATIONS (Net Appropriations*)	8,493,454	6,330,579	(2,162,875)	75%
Surplus / (Deficit) (Total Revenues - Total Appropriations)	-936,201	999,232	1,935,433	-107%
ENDING FUND BALANCE	12,459,294	14,394,727	1,935,433	116%
Total S&B	1,811,402	1,565,063	(246,339)	86%

FIRST 5 SAN MATEO COUNTY

FY 2025-26 BUDGET CLOSE OUT DETAILS

	ORG/ACCT#	FY25-26 Revised Budget	FY25-26 Budget Close Out	FY25-26 Budget Close Out (+/-) vs. FY25-26 Revised Budget (\$)	FY25-26 Budget Close Out (+/-) vs. FY25-26 Revised Budget (%)	Notes to FY2025-26 Budget Close Out
BEGINNING FUND BALANCE (Beginning Reserves*)		13,395,495	13,395,495	0	100%	Adjusted to Ending Fund Balance of F5SMC Audit Report for the year ending 6.30.2025, page 39
A. Interest Revenue	19510-1521	401,865	723,303	321,438	180%	Higher interest earning rate in county investment pool.
B. Tobacco Tax Revenue		3,412,446	3,651,309	238,863	107%	
Tobacco Tax Revenue Fiscal Year Allocations	19510-1861	3,412,446	3,651,309	238,863	107%	Higher-than-projected revenue disbursements compared to the most recent five-year Tobacco Tax Revenue projection. Agency fully executes the \$1M MHSA grant and its June 30, 2026 expiration, alongside with two new Other Grants executed for only three quarters.
C1. Other Grant Revenues - Non Baby Bonus Program		2,469,597	2,125,171	(344,426)	86%	
F5 San Benito IMPACT LEGACY Grant FY25-26	19510-2643	324,605	323,613	(992)	100%	
F5 San Benito IMPACT HUB TA FY25-26	19510-2643	48,206	48,206	0	100%	
County of San Mateo BHRS - Mental Health Services MHSA #4 FY25-26	19510-2643	900,000	992,862	92,862	110%	The \$1 million MHSA grant has been fully executed and is set to expire on June 30, 2026.
Peninsula Healthcare District - Help Me Grow SMC CY2025	19510-2643	60,000	60,000	0	100%	
Sequoia Healthcare District - Special Needs Grant FY25-28	19510-2643	373,400	230,420	(142,980)	62%	
Sequoia Healthcare District - Mental Health Grant FY25-28	19510-2643	315,900	172,561	(143,339)	55%	
Children and Youth Behavior Health Initiatives - Round 2	19510-2643	447,486	297,509	(149,977)	66%	
C2. Other Grant - Baby Bonus Program		1,272,273	828,956	(443,317)	65%	Underspending as parent enrollment is progressing at a slower pace than anticipated.
SMC Health, Family Health Services - Baby Bonus Dividend Program**	19510-2647	182,700	183,017	317	100%	WOC Community Health Planner
Health Plan of San Mateo - Baby Bonus Program	19510-2647	202,033		(202,033)	0%	
County CEO - Measure K - Baby Bonus Program	19510-2647	134,340	292,080	157,740	217%	
County CEO - Measure K - Baby Bonus Program	19510-2647		13,950	13,950		
Silicon Valley Community F. - CZI - Baby Bonus Program	19510-2647	320,200	302,454	(17,746)	94%	
Sobrato Family Foundation - Baby Bonus Program	19510-2647	140,000		(140,000)	0%	
Jackie Speier Foundation - Baby Bonus Program	19510-2647			0		New grant award. Received \$350K grant funding.
Sequoia Healthcare District - Baby Bonus Program	19510-2647	243,000	37,355	(205,645)	15%	New grant award. Received \$243K grant funding.
Peninsula Healthcare District - Baby Bonus Program	19510-2647	50,000		(50,000)	0%	New grant award. Received \$250K grant funding.
Survey Incentive - Baby Bonus Program	19510-2647		100	100		
Other Revenue - Wellness Dividend Grant	19510-2101		1,072	1,072		
TOTAL REVENUES		7,556,181	7,329,811	(226,370)	97%	Overall Total Revenue performance—reaching 97% of total planned budget—was primarily driven by higher Interest earnings and increased Tobacco Tax disbursements, which were partially offset by a slower pace of parent enrollment in the Baby Bonus Program.
TOTAL AVAILABLE FUNDS (TOTAL SOURCES*)		20,951,676	20,725,306	(226,370)	99%	
APPROPRIATIONS						
PROGRAM APPROPRIATIONS						
D1. Strategic Plan Investment - SPIP FY 25-28 - Primary Domains		1,841,968	1,181,025	(660,942)	64%	This category is 64% budget execution as spending was prioritized on the one-year MHSA grant, alongside a three-quarter execution window for two key legacy programs with amendments through October 31, 2025 and an initial slower program execution as the new funding cycle began. SPIP spending is anticipated to increase in subsequent fiscal years leading up to the MHSA grant expiration on June 30, 2026.
Resilient Family	19540-6125	366,786	176,414	(190,372)	48%	
Healthy Children	19540-6156	858,081	438,508	(419,573)	51%	
Quality Care and Education	19540-6263	267,000	192,407	(74,593)	72%	

	ORG/ACCT#	FY25-26 Revised Budget	FY25-26 Budget Close Out	FY25-26 Budget Close Out (+/-) vs. FY25-26 Revised Budget (%)	FY25-26 Budget Close Out (+/-) vs. FY25-26 Revised Budget (%)	Notes to FY2025-26 Budget Close Out
Grant Management and Other Evaluation Projects	19540-6265	90,101	130,400	40,299	145%	
Policy Advocacy, Communications & Systems Change	19540-6814	260,000	243,297	(16,703)	94%	
D2. Strategic Plan Investment - SPIP FY 23-25 Carry Over		800,000	583,947	(216,053)	73%	These funds supported two key legacy programs through their final phases of execution (amendments ending October 31, 2025) while facilitating planning and contracting for emergent project investments in coordination with 3-year funding cycle SPIP FY 2025–28.
Healthy Children	19540-6156	188,456	144,043	(44,413)	76%	These agreements / amendments ended 10.31.2025
Quality Care and Education	19540-6263	346,624	346,624	0	100%	These agreements / amendments ended 10.31.2025
Grant Management and Other Evaluation Projects	19540-6265	33,544	41,945	8,401	125%	These agreements / amendments ended 10.31.2025
Healthy Children	19540-6156	100,000		(100,000)	0%	
Resilient Family	19540-6125		13,500	13,500		
Grant Management and Other Evaluation Projects	19540-6265	25,000		(25,000)	0%	
Policy Advocacy, Communications & Systems Change	19540-6814	100,000	33,335	(66,665)	33%	
Emerging Projects	19540-6814	6,376	4,500	(1,876)	71%	
E1. Other Grant Appropriations - Non Baby Bonus Program		2,347,710	1,826,811	(520,899)	78%	Other Grants (Non Baby Bonus program) achieved 78% budget execution. This performance was primarily driven by the full execution of a \$1M MHSA grant paired with six Other Grants— <i>Impact Legacy, Impact Hub, Integrated System for Children with Special Needs, Trauma-Informed System Initiatives, Children and Youth Behavioral Health Initiatives, and Help Me Grow Call Centers</i> —utilized as braided funding across 14 SPIP community investment contracts alongside with two out of seven new grants billing for only three quarters as new grant funding award began.
F5 San Benito IMPACT LEGACY Grant FY25-26	19540-6126	261,605	260,742	(862)	100%	
F5 San Benito IMPACT HUB TA FY23-25	19540-6126	48,206	48,206	0	100%	
County of San Mateo BHRS - Mental Health Services MHSA #4 FY25-26	19540-6141	900,000	857,026	(42,974)	95%	The \$1 million MHSA grant has been fully executed and is set to expire on June 30, 2026.
Sequoia Healthcare District - Special Needs FY25-28	19540-6131	336,600	212,020	(124,580)	63%	
Sequoia Healthcare District - Mental Health Grant FY25-28	19540-6131	298,300	154,970	(143,330)	52%	
Peninsula Healthcare District - Help Me Grow SMC CY2025	19540-6161	53,000	52,096	(904)	98%	
Children and Youth Behavioral Health Initiatives - Round 2	19540-6161	450,000	241,751	(208,249)	54%	Grant no-cost extension through 6.30.2027
E2. Other Grant Appropriations - Baby Bonus Program		1,272,273	828,856	(443,417)	65%	Underspending as parent enrollment is progressing at a slower pace than anticipated.
SMC Health, Family Health Services - Baby Bonus Dividend Program**	Salaries & Benefits	182,700	183,017	317	100%	Community Health Planner - WOC position
Health Plan of San Mateo - Baby Bonus Program	6135 / 6264 / 6266	202,033	0	(202,033)	0%	
County CEO - Measure K - Baby Bonus Program	6135 / 6264 / 6266	134,340	292,080	157,740	217%	
County CEO - Measure K - Baby Bonus Program	6135 / 6264 / 6266		13,950	13,950		
Silicon Valley Community F. - CZI - Baby Bonus Program	6135 / 6264 / 6266	320,200	302,454	(17,746)	94%	
Sobrato Family Foundation - Baby Bonus Program	6135 / 6264 / 6266	140,000		(140,000)	0%	
Jackie Speier Foundation - Baby Bonus Program	6135 / 6264 / 6266			0		
Sequoia HealthCare District - Baby Bonus Program	6135 / 6264 / 6266	243,000	37,355	(205,645)	15%	
Peninsula Healthcare District - Baby Bonus Program	6135 / 6264 / 6266	50,000		(50,000)	0%	
F. Program Operations		1,390,226	1,120,737	(269,489)	81%	Program Operations delivered 81% budget execution as the result of savings from various operation budget lines as staff working hybrid format and from vacant position.
Program Shared Operating Budget		210,050	172,438	(37,612)	82%	
Program Staff S&B & Shared Admin Staff Time		966,830	740,740	(226,090)	77%	Excluding WOC - Community Health Planner position for the Baby Bonus Program
Evaluation Staff S&B		213,346	207,559	(5,787)	97%	
Total Program Appropriations (D1+D2+D3+E1+E2+F)		7,652,177	5,541,377	(2,110,800)	72%	execution. This was primarily driven by the full execution of a \$1M MHSA grant paired with six Other Grants— <i>Impact Legacy, Impact Hub, Integrated System for Children with Special Needs, Trauma-Informed System Initiatives, Children and Youth Behavioral Health Initiatives, and Help Me Grow Call Centers</i> —utilized as braided funding across 14 SPIP community investment contracts. These gains were partially offset by a slower initial SPIP rollout as spending focused on the one-year MHSA grant, slower SPIP program execution as the new funding cycle began (SPIP spending is anticipated to increase in subsequent fiscal years leading up to the MHSA grant expiration on June 30, 2026), and slower

	ORG/ACCT#	FY25-26 Revised Budget	FY25-26 Budget Close Out	FY25-26 Budget Close Out (+/-) vs. FY25-26 Revised Budget (\$)	FY25-26 Budget Close Out (+/-) vs. FY25-26 Revised Budget (%)	Notes to FY2025-26 Budget Close Out
ADMIN APPROPRIATIONS						
G. Admin Shared Operating Budget		210,050	172,438	(37,612)	82%	
H. Admin Staff S&B		631,226	616,764	(14,462)	98%	
Total Administrative Appropriations		841,276	789,202	(52,074)	94%	Admin Appropriations achieved 94% budget execution. This was primarily driven by underspending across various Service and Supplies budget areas due to staff operating in a hybrid work format, alongside partial savings from vacant positions.
Administrative Cost Rate %		10%	12%			
TOTAL APPROPRIATIONS (NET APPROPRIATIONS*)		8,493,454	6,330,579	(2,162,875)	75%	Total Appropriations achieved a 75% budget execution rate. This performance was primarily driven by the full execution of a \$1M MHSA grant used as braided funding across 14 SPIP community investment contracts. These gains were partially offset by a slower initial SPIP rollout as spending focused on the one-year MHSA grant, slower SPIP program execution as the new funding cycle began (SPIP spending is anticipated to increase in subsequent fiscal years leading up to the MHSA grant expiration on June 30, 2026), and slower Baby Bonus program execution, and vacancy savings.
ENDING FUND BALANCE (ENDING RESERVES*)		12,459,294	14,394,727	1,936,505	116%	Budget Close Out Surplus of \$999K. The 16% higher Ending Fund Balance was primarily driven by higher Interest Revenue and increased Tobacco Tax disbursements, alongside the full execution of a \$1M MHSA grant utilized as braided funding across SPIP community investment contracts. These positive factors were partially offset by a slower SPIP rollout at the start of the new funding cycle (prioritizing the spend-down of the one-year MHSA grant), lower execution in the Baby Bonus Program, and savings from vacant positions.

Schedule 1- FY 2025-26 OPERATING BUDGET CLOSE OUT

Attachment 9C

	ORG / ACCT#	FY25-26 Revised Budget	FY25-26 Budget Close Out	FY25-26 Budget Close Out (+/-) vs. FY25-26 Revised Budget (\$)	FY25-26 Budget Close Out (+/-) vs. FY25-26 Revised Budget (%)	Notes to FY2025-26 Budget Close Out
I. Services and Supplies						
Outside Printing & Copy Svc	19510-5191	1,000	0	(1,000)	0%	Placeholder for strategic plan printing costs.
General Office Supplies	19510-5193	7,000	2,974	(4,026)	42%	
Photocopy Lease & Usage	19510-5196	3,500	1,122	(2,378)	32%	
Direct Communication Expenses	19510-5132	1,671	1,003	(668)	60%	
Computer Supplies	19510-5211	10,000	3,902	(6,098)	39%	New laptop replacements. Placeholder for emerging IT equipment needs.
Software License /Maintenance Expenses	19510-5215	1,090	16	(1,074)	2%	Slit to ISD account 6752 with budget of \$6,782.
County Memberships - (e.g. F5 Assn Dues)	19510-5331	33,200	32,708	(492)	99%	
Auto Allowance	19510-5712	11,000	10,884	(116)	99%	
Meetings & Conference Expense	19510-5721	8,000	1,889	(6,111)	24%	combined accounts 5713, 5714, 5717
Commissioners Meetings & Conference Exp	19510-5723	5,000	1,589	(3,411)	32%	
Other Business Travel Expense	19510-5724	8,000	4,121	(3,879)	52%	combined accounts 5722, 5724
Dept. Employee Training Expense	19510-5731	5,327	748	(4,579)	14%	
Wellness grant	19510-5856	1,072	222	(850)	21%	
Other Professional Services	19510-5858	27,428	5,776	(21,652)	21%	County Controller Office Service agreements
Sub Total - Services & Supplies		123,288	66,954	(56,334)	54%	Underspend in various operation budget lines.
II. Other Charges						
Telephone Service Charges	19510-6712	434	547	113	126%	Increase in county service charges
Automation Services - ISD	19510-6713	36,664	36,143	(521)	99%	Slit to ISD accounts 6752,6754,6758,6763,6770
Annual Facilities Lease	19510-6716	80,000	84,433	4,433	106%	Paid 2 rent operations surcharges of 2024 & 2025 prior to second Lease Amendment.
General Liability Insurance	19510-6725	22,059	22,059	0	100%	
Official Bond Insurance	19510-6727	298	298	(0)	100%	
Human Resources Services	19510-6733	264	264	(0)	100%	
Countywide Security Services	19510-6738	756	756	0	100%	
All Other Service Charges	19510-6739	60,210	36,800	(23,410)	61%	
Card Key Services	19510-6751	962	962	0	100%	
ISD Prvd Software Lic/Maint	19510-6752	6,789	8,447	1,658	124%	Slit to account 5215 and account 6752.
Data Backup & Recovery Subsc	19510-6754	946	889	(57)	94%	
Desktop Support Subscription	19510-6758	8,150	7,739	(411)	95%	
Virtual Private Network Subs	19510-6763	332	114	(218)	34%	
Virtual Server Subscription	19510-6770	3,948	2,666	(1,282)	68%	combined accounts 6770 & 6771
A-87 Expense	19510-6821	75,000	75,803	803	101%	
Sub Total - Other Charges		296,812	277,922	(18,890)	94%	
Total Operating Budget		420,100	344,876	(75,224)	82%	Positive variances associated with underspending across Services and Supplies budget lines.
Program Shared Operating Budget		210,050	172,438	(37,612)	82%	Allocation rate 50% to Program
Admin Shared Operating Budget		210,050	172,438	(37,612)	82%	Allocation rate 50% to Admin

Schedule 2 - FY 2025-26 SALARIES & BENEFITS BUDGET CLOSE OUT

Attachment 9C

Program Staff & Shared Admin Staff	966,830	740,740	(226,090)	77%	27% Admin staff time allocated to Program; Saving from unfilled vacant position.
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Evaluation Staff		213,346		207,559	(5,787)	97%	
Admin Staff		631,226		616,764	(14,462)	98%	
F5SMC Salaries and Benefits		\$ 1,811,402		\$ 1,565,063	\$ (246,339)	86%	Saving from unfilled vacant position.
Baby Bonus Dividend Program - WOC		\$ 182,700		\$ 183,017		100%	

Color Coding

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

Date: October 26, 2026

To: First 5 San Mateo County Commission

From: Michelle Blakely, Interim Executive Director

Re: Approval of First 5 San Mateo County's FY 2025-26 Annual Program Report and Submission to First 5 California

BACKGROUND

As part of First 5 California's (F5CA) Annual Report requirements, all First 5 County Commissions provide detailed information on fiscal and programmatic progress to the First 5 State Commission each year. Client data and program expenditure information from the First 5 San Mateo County (F5SMC) Annual Report for FY 2025-26 will be presented at today's meeting.

The State Commission expenditure and service categories are structured to emphasize the types of organizations that receive First 5 funding and to gather some limited information on evidence-based service models in use across the state. The State requests that county commissions provide an estimate of the unduplicated count of clients served, in addition to service counts by type of program.

CONSIDERATIONS

- F5SMC's Annual Report to First 5 California summarizes our annual activities in the format required by the State Commission. The report includes Finance, Evaluation, and Funded Strategy information on all First 5 San Mateo County projects.
- F5SMC is required to report fiscal and programmatic information based on F5CA's four Service Result Areas: Child Development, Child Health, Family Functioning, and Improved Systems of Care.
- The F5SMC Income, Expenditure, and Service Result Areas reports are attached to this memo, as are the County Highlights and Evaluation Summary (**See Attachments: 10A, 10B, 10C, and 10D**).
- The report was reviewed by the Early Childhood Evaluation Subcommittee at its meeting on October 19, 2026.
- The financial information included in this report was developed based on the information provided to our independent auditor for the annual audit.
- Each County Commission's Annual Report is required to be submitted through the F5 California reporting portal by 11:59 pm on October 31, 2026.

FISCAL IMPACT

None.

RECOMMENDATION

Approve First 5 San Mateo County's FY 2025-26 Annual Program Report and Submission to First 5 California.



Annual Report AR-1
San Mateo Revenue and Expenditure Summary
July 1, 2025 - June 30, 2026

Revenue Detail

Category	Amount
Tobacco Tax Funds	\$3,649,651
IMPACT Legacy	\$323,613
Small Population County Augmentation Funds	\$0
Home Visiting Coordination Funds	\$0
Other First 5 California Funds	\$48,206
Other First 5 California Funds Description IMPACT Hub grant	
Other Public Funds	\$2,280,827
Other Public Funds Description SMC Behavioral Health and Recovery Services MHSA grant for \$992,862; Peninsula Healthcare District Special Needs grant for \$60,000; Sequoia Healthcare District Special Needs, Mental Health, and Baby Bonus Grants for \$440,336; Children and Youth Behavioral Health Initiative grant for \$297,509; Family Health Services Baby Bonus grant for \$183,017; County CEO funding for Baby Bonus for \$306,030; County Wellness Grant for \$1,072	
Donations	\$0
Revenue From Interest Earned	\$591,900
Grants	\$302,554
Grants Description Silicon Valley Community Foundation CZI grant for Baby Bonus at \$302,454; Baby Bonus Survey Incentive at \$100	
Other Funds	\$0
Other Funds	
Total Revenue	\$7,196,751

Improved Family Support

Service	Grantee	Program(s)	Children	Caregivers	Providers	Amount
General Family Support	First 5 County Commission	Not Applicable (Kits for New Parents)	0	678	0	\$31,000
General Family Support	Research/Consulting Firm	Not Applicable (Community of Practice for Family Support & Engagement Professionals)	0	0	110	\$92,947
General Family Support	County Office of Education/School District	Not Applicable (Friday CAFE Professional Learning Community)	0	0	106	\$64,205
General Family Support	Child Care Centers	- Five Protective Factors - Playgroups - Triple P 2-3	116	144	24	\$112,713
General Family Support	CBO/Non-Profit	- Abriendo Puertas - Not Applicable (Dyadic mental health interventions) - Playgroups	12	12	0	\$49,400
General Family Support	CBO/Non-Profit	Not Applicable (Legal consultation on immigration issues)	0	8	0	\$1,080
Intensive Family Support	CBO/Non-Profit	Not Applicable (Unconditional Cash Gift and Care Coordination Services)	261	261	0	\$626,349
Total						\$1,177,694

Service	Grantee	Program(s)	Children	Caregivers	Providers	Amount
Intensive Family Support	CBO/Non-Profit	Not Applicable (Mental health and system navigation support for families experiencing domestic violence)	42	49	0	\$200,000
					Total	\$1,177,694

Improved Child Development

Service	Grantee	Program(s)	Children	Caregivers	Providers	Amount
Quality Early Learning and Care Supports	County Office of Education/School District	Not Applicable (IMPACT Legacy)	0	0	68	\$261,605
Quality Early Learning and Care Supports	Child Care Centers	Not Applicable (Early Childhood Mental Health Consultation)	116	144	24	\$60,000
Quality Early Learning and Care Supports	CBO/Non-Profit	Not Applicable (Early Childhood Mental Health Consultation)	256	5	57	\$135,000
Quality Early Learning and Care Supports	Resource and Referral Agency (COE or Non-Profit)	- Not Applicable (Enhanced Referrals for Children with Special Needs; Inclusion Support) - Quality Counts California	14	34	55	\$118,771
Quality Early Learning and Care Supports	County Office of Education/School District	- Not Applicable (Provider Professional Development; Parent Training & Support; Provider Coaching) - Quality Counts California	792	297	4687	\$458,529
Total						\$1,033,905

Improved Child Health

Service	Grantee	Program(s)	Children	Caregivers	Providers	Unique Families	Amount
Early Intervention	CBO/Non-Profit	- Care Coordination and Linkage - Developmental Playgroups - Mild-to-Moderate Supports	1119	2253	321	0	\$529,756
Early Intervention	CBO/Non-Profit	Not Applicable (Legal Services to Support Access to Care)	37	58	42	0	\$94,728
Early Intervention	CBO/Non-Profit	Not Applicable (Mental Health Services)	6	6	0	0	\$31,771
Early Intervention	CBO/Non-Profit	- Care Coordination and Linkage - Developmental Playgroups	227	708	0	0	\$94,728
Early Intervention	Research/Consulting Firm	Not Applicable (Trauma-Informed Systems and Services trainings; Child-Parent Psychotherapy trainings)	0	0	163	0	\$157,388
Total							\$1,267,356

Service	Grantee	Program(s)	Children	Caregivers	Providers	Unique Families	Amount
Early Intervention	CBO/Non-Profit	• Developmental Playgroups • Not Applicable (Child Parent Psychotherapy; Parent support groups; navigation support)	59	49	0	0	\$197,678
Early Intervention	CBO/Non-Profit	• Developmental Playgroups • Not Applicable (Child-Parent Psychotherapy; Parent Support Groups)	318	234	0	0	\$161,307
Total							\$1,267,356

Improved Systems Of Care

Service	Grantee	Program(s)	Amount
Policy and Public Advocacy	Other Private/For Profit	Not Applicable (Communications Consultation Services)	\$160,000
Policy and Public Advocacy	Resource and Referral Agency (COE or Non-Profit)	- Early Learning - Revenue Sustainability	\$98,297
Systems Building	Research/Consulting Firm	Not Applicable (Evaluation Consultation & Support)	\$82,245
Systems Building	Higher Education	Trauma-Informed Care/ACES	\$73,616
Systems Building	Other Private/For Profit	Not Applicable (Grants Management & Data System)	\$90,100
Systems Building	CBO/Non-Profit	Health Systems	\$2,400
Systems Building	Research/Consulting Firm	Trauma-Informed Care/ACES	\$231,815
Systems Building	County Office of Education/School District	Not Applicable (Early Learning IMPACT Hub)	\$48,206
Systems Building	First 5 County Commission	- Early Identification and Intervention - Family Resiliency - Health Systems - Trauma-Informed Care/ACES	\$697,853
Total			\$1,484,532

Expenditure Details

Category	Amount
Program Expenditures	\$4,963,487
Administrative Expenditures	\$961,791
Evaluation Expenditures	\$379,904
Total Expenditures	\$6,305,182
Excess (Deficiency) Of Revenues Over (Under) Expenses	\$891,569

Other Financing Details

Category	Amount
Sale(s) of Capital Assets	\$0
Other	\$0
Total Other Financing Sources	\$0

Net Change in Fund Balance

Category	Amount
Fund Balance - Beginning	\$13,715,071
Fund Balance - Ending	\$14,606,640
Net Change In Fund Balance	\$891,569

Fiscal Year Fund Balance

Category	Amount
Nonspendable	\$0
Restricted	\$0
Committed	\$11,213,285
Assigned	\$3,393,355
Unassigned	\$0
Total Fund Balance	\$14,606,640

Expenditure Note

No data entered for this section as of 10/14/2026 5:24:59 PM.



Annual Report AR-2
San Mateo Demographic Worksheet
July 1, 2025 - June 30, 2026

Population Served

Category	Number
Providers	5,390
Children Less than 3 Years Old	1,807
Children – Ages Unknown (birth to 6th Birthday)	200
Primary Caregivers	2,887
Children from 3rd to 6th Birthday	1,368
Total Population Served	11,652

Primary Language Spoken in Home

Category	Number of Children	Number of Primary Caregivers
English	845	920
Spanish	1,213	1,009
Cantonese	13	13
Mandarin	152	36
Other - Specify with text box	179	129
Unknown	973	780
Totals	3,375	2,887

Race and/or Ethnicity of Population Served

Category	Number of Children	Number of Primary Caregivers
Alaska Native/American Indian	3	4
Asian	378	381
Non-Hispanic Black or African American	25	32
Hispanic/Latino	1,468	1,251
Native Hawaiian or Other Pacific Islander	36	26
Non-Hispanic White	191	204
Other – Specify with text box Multiracial	129	122
Other – Specify with text box Other	41	44
Unknown	1,104	823
Totals	3,375	2,887

Duplication Assessment

Category	Data
Degree of Duplication	10%
Confidence in Data	Somewhat confident
Additional Details (Optional)	Past formal duplication assessments have found rates of 2-11%. Outreach touches are not included in deduplicated service numbers. Kits for New Parents are not included in deduplicated service numbers.

F5SMC FY 2025-26 Annual Report to F5 California County Highlights

1. *Please identify one highlight from the programs or initiatives that your county currently focuses on. Briefly describe the purpose of the work highlighted and specific activities undertaken and mention significant contextual information such as funding shifts or emerging community needs. (1000 characters)*

F5SMC is a key partner in the Baby Bonus Project, an initiative providing direct cash payments and home visiting and care coordination services to families of newborns eligible for Medi-Cal. The project aims to support low-income families both by increasing household income and improving access to and engagement with services. A Randomized Controlled Trial (RCT) evaluation will examine the relationship between cash payments, service access, and child and family outcomes. Due to the RCT design, 25% of participating families will receive home visiting and care coordination services along with monthly \$300 payments for 36 months, from the baby's birth to their third birthday. An additional 25% of participating families receive home visiting and care coordination only. The remaining participants make up the control group. The project also fosters systems integration with joint program planning and formal Data Use Agreements across multiple partners.

2. *For the highlights mentioned above, please include one or two key data points that demonstrate measurable impact, e.g. number of children served, training conducted, percentage increase in participation, or improvement in skills/capacity/quality. (1000 characters)*

During FY 2025-26, 131 families received both cash payments and home visiting and care coordination services, while an additional 130 families received home visiting and care coordination services only. Race/ethnicity of all participants (n=521), including control group families, is as follows:

- American Indian/Alaskan Native: 0.3%
- Asian: 2.6%
- Black/African American: 2.4%
- Hispanic/Latino: 80%

- Native Hawaiian/Other Pacific Islander: 1.5%
- White: 4%
- Multiracial: 7%
- Unknown: 2.2%

Among families receiving cash payments:

- The average household size is 4, with 2 children
- 75% of households are under the Federal Poverty Line
- 45% find it somewhat or very difficult to pay for usual household expenses
- 20% sometimes do not have enough food to feed their families
- Families prioritize paying for housing costs, food, and caregiving expenses

3. *For the highlight mentioned above, please describe how the selected program or initiative supports equity and engages diverse community partners, such as reaching underserved populations, elevating parent voice, or establishing collaborations with new partners that extend community reach. (1000 characters)*

The Baby Bonus program created an extensive partnership structure to support program design, implementation, and evaluation. Partners include: the San Mateo County Health System, Stanford University, Lucile Packard Children's Hospital at Stanford, Stanford Children's Health, the San Mateo County Human Services Agency, the Health Plan of San Mateo, UpTogether, and the Jackie Speier Foundation. The project includes new memoranda of understanding and data use agreements amongst these partners, resulting in more streamlined and integrated data sharing practices. This is a systems-building victory that supports timely and accurate communication between health programs serving MediCal eligible families with newborns, enabling more seamless service delivery without burdening families with the task of managing communication among the health providers who are serving their child. Family focus groups have been used to provide participant input into program development.

4. *For the highlight mentioned above, please include a brief quote or story that reflects the voices of those impacted this fiscal year by your county's programming. (1000 characters)*

Parents receiving cash gifts have shared comments reflecting the impact of this program on their families' well being. Comments include:

"Definitely a program I am happy I was able to participate in. It came at the right time. Especially being out of work after a baby and recovery it definitely helps out."

"Of course, I'm so happy with the help, because during these very difficult times we've been going through financially, the help from [the program] is the best thing that could have happened to us as a family. It's helping me cover the cost of diapers for my newborn, among other things that are necessary for the household. Thank you so much."

"It's a huge mental relief receiving this money to use towards whatever I need for baby."

"It makes me happy because I can buy food."

5. *Please close with a brief statement about what's next, highlighting your county's commitment to continued progress, innovation, and collaboration in the year ahead. (1000 characters)*

Over the next year, we anticipate completing our enrollment into the RCT by adding approximately 680 families to the program. We will continue fostering our deep collaborative relationships with cross-sector organizations on program planning, implementation, and evaluation through regular meetings of our Care Coordination Workgroup, Evaluation Committee, and Core Team, and we anticipate additional formalized partnerships such as Memoranda of Understanding and Data Use Agreements among participating agencies. Our Year-One evaluation data will become available, allowing us to begin to examine the impacts of this work. We look forward to our ongoing engagement with the Baby Bonus Project!

F5SMC FY 2025-26 Annual Report to F5 California

Evaluation Summary

- 1. Please share one to two key programs or initiatives you provided to the community for the fiscal year. For each one, tell us about its purpose, core service elements, and target population. (2000 characters)*

Local needs assessments consistently find that San Mateo County families with young children have difficulty accessing mental and behavioral health services that can meet their needs; clinicians with specialized training to work with children ages 0-5 are in high demand. Supported by a grant from the California Children & Youth Behavioral Health Initiative, F5SMC has trained over 60 mental health clinicians in Child-Parent Psychotherapy (CPP). These clinicians work in a variety of settings, including non-profit organizations, family resource centers, early learning sites, private practice, and San Mateo County Health. During the 18-month training period, clinicians receive classroom instruction, participate in case presentations, and receive coaching and mentorship from peers as well as from experienced CPP practitioners. Once the training series is complete, graduates are linked to an ongoing support network both within and across organizations. The network provides reflective supervision, peer support groups, and a community of practice to deepen and embed CPP practices within their ongoing therapeutic work.

The goal of this effort is to expand access to evidence-based, intensive, dyadic therapy for children ages 0-5 and their families. Local needs assessments and parent surveys have consistently found that San Mateo County families with young children have difficulty accessing mental and behavioral health services that can meet their needs; clinicians with specialized training to work with children ages 0-5 are in high demand. Participating clinicians are drawn from organizations that prioritize underserved populations, such as San Mateo County Health Behavioral Health and Recovery Services, which serves the MediCal population and families involved with Child Protective Services; CORA, a non-profit serving families impacted by domestic violence; and non-profits serving the migrant farm-working community.

2. *For the program or initiative you mentioned above, please outline the evaluation methodology, including how data was collected and analyzed (e.g., surveys, interviews, data analysis), the type of data used (quantitative or qualitative), and any sampling techniques applied. Additionally, identify any limitations, such as data gaps, sample size constraints, or external factors that may have influenced data collection and analysis. (1000 characters)*

Evaluation of the Child-Parent Psychotherapy Cohorts was conducted via SurveyMonkey survey at the conclusion of the 18-month training period. Of the 63 clinicians who initiated training, 6 were unable to complete the series, resulting in a final count of 57 trained. Of these, 31 completed the final survey for a response rate of 54%. Quantitative survey data were analyzed using excel, primarily focused on frequencies and percentages. Minimal qualitative information was gathered via comments and narrative fields on the survey. The evaluation survey focused on information about the trainees, their perceptions of the utility of the training, plans for using their learnings going forward, anticipated barriers and challenges to implementation, and secondary traumatic stress. One limitation of the survey is the moderate response rate.

3. *For the program or initiative you mentioned above, please summarize key findings in a clear, data-driven manner, highlighting whether the program met its intended objectives. Please use specific data points gathered throughout the year to support your analysis. If possible, compare pre- and post-program data or provide longitudinal trends to highlight progress over time. (1000 characters)*

This program has trained 57 local mental health clinicians in an evidence-based, dyadically-oriented early childhood mental health model that will be used to expand access to care for underserved populations.

Most trainees (87%) have 1-10 children ages 0-5 in their caseloads, the remainder have 11-20. More than 3 in 4 (77%) see their CPP clients at least once per week, the remainder see them 2-3 times per month. For most clinicians (74%) the course of treatment with CPP clients lasts from 7 months to 2 years.

When asked about implementing what they have learned, 97% of clinicians reported that they were moderately (17%) or very (80%) likely to use their new skills. Over half (55%) stated that they felt very prepared to implement what they have learned, and 42% felt moderately prepared.

When asked about using the full CPP model with new clients over the next year, 71% were likely or very likely to do so, and on average expected to serve up to 5 new families with this practice.

4. *For the program or initiative you mentioned above, use evaluation findings to assess whether it successfully reached the intended populations, particularly marginalized communities. If there were challenges in reaching these groups, describe the obstacles faced and any evidence-informed strategies being implemented to address them. (1000 characters)*

There is value in mental health clinicians being culturally and linguistically concordant with their patients. We asked CPP trainees to share their race/ethnicity, as well as any languages they use with their CPP clients.

Race/Ethnicity (participants could select multiple options, so percentages total to more than 100%)

- Hispanic/Latine: 55%
- White/Caucasian: 31%
- Asian/Asian American: 14%
- Multi-Racial: 7%
- American Indian/Alaskan Native: 3%
- Other/Unk: 7%

86% of trainees use English with their CPP clients, 64% use Spanish, 4% use Portuguese and 7% use Hindi. Other languages they speak include: Russian, Punjabi, French, Greek, Italian, and Mandarin.

About a third (35%) of trainees have been in the early childhood mental health field for less than 5 years, another third (32%) have been in the field for 5-9 years, and about a quarter (23%) have been in the field for 20 or more years.

5. *Based on the evaluation findings, please identify key lessons learned and provide recommendations to improve or refine the program or initiative mentioned above. (1000 characters)*

It is important to understand providers' experiences of secondary traumatic stress and risk of burnout. Families in San Mateo County are enduring escalating levels of stress related to the high cost of living, loss of federal safety-net benefits, and increasing immigration enforcement. Identifying clinicians who are struggling to provide high quality therapeutic support due to secondary traumatic stress, or who may even be at

risk of leaving the profession, is critical to maintaining this CPP services for children and families.

Participants in our CPP training cohorts complete the Secondary Traumatic Stress (STS) Scale. Findings include:

- On average, ECMH clinicians reported mild secondary traumatic stress
- 28% reported minimal STS, and 38% reported mild STS
- 24% reported moderate levels of STS
- 10% reported high or severe levels of STS

We are working to stabilize the workforce through interventions such as reflective supervision, peer support groups, and communities of practice. Ongoing support for clinicians can enable them to better support children and families.

**FIRST 5 SAN MATEO COUNTY (F5SMC)
FIRST 5 STAFF TEAM REPORT
OCTOBER 2026**

STRATEGIC INVESTMENT FOCUS AREAS – UPDATE

QUALITY CARE AND EDUCATION

Child Care Blueprint – The Children’s Collective

On October 15, 2026, the Children’s Collective convened to focus on the Child Care Blue Print. F5SMC is a lead agency implementor and member of the Action Roundtable Highlights include:

- Blueprint Progress: Participants recognized momentum across several strategies, including Child Coordinating Council’s (4Cs) upcoming Leadership Awards, expanded workforce permit support, and the opening of AbilityPath’s inclusive Learning Links child care center at ELCO Yards.
- Advocacy Opportunities: Build Up and The Children’s Collective are exploring ways to advance child care considerations within the Brisbane Baylands development.
- Evaluation and Learning: The Stanford Center on Early Childhood presented its evaluation approach and ongoing development of a Theory of Impact. Discussion was focused on measuring both progress toward Blueprint goals and the added value created through collective action and priority impact measures. Key areas identified for evaluation include child care affordability and access, workforce compensation, child care capacity utilization, and the effectiveness of a coordinated countywide child care system.

Child Care Partnership Council (CCPC)

On September 28, 2026, Staff participated in The CCPC’s regular meeting which covered two main items: Head Start Notice of Proposed Rulemaking (NPRM): Angel Barrios and Jennifer Pifeleti presented on the potential nationwide effects of the August 7 NPRM. The proposal would remove or revise much of the Head Start Program Performance Standards. The Administration for Children and Families states that the intent is to reduce administrative burden, increase local flexibility, and focus oversight on statutory requirements. Potential impacts for local programs may include changes to staffing, instruction, family engagement, eligibility, and support services.

Community Development Block Grant (CDBG) opportunity: Karen Coppock presented information on Department of Housing CDBG funding available for childcare and early-learning facilities. Funding may support construction or rehabilitation of public facilities, including childcare centers, where the property is publicly or community-based organization owned and serves low-income residents. Childcare providers may need substantial, targeted technical assistance to pursue these and similar grant opportunities.

HEALTHY CHILDREN

ALAS Colibri Child Wellness Center

First 5 SMC staff attended the opening of the ALAS Colibri Child Wellness Center facility in Half Moon Bay on October 8. First 5 SMC has been a funder of ALAS and Colibri for their Early Childhood Mental Health service provision since July 2025. First 5 SMC-funded work includes screening, resource distribution, parent-child groups and workshops, and intensive clinical support for young children and their caregivers.

Fluoride Webinar for Healthcare Providers

On October 21, the American Academy of Pediatrics Chapter 1 hosted a fluoride-focused webinar in partnership with the SMC Oral Health Coalition and First 5 SMC. The webinar, titled Chapter Chat: Fluoride Facts and Fallacies *What You Need to Know to Talk with Families*, featured Dr. Susan Fisher-Owens from UCSF as the presenter, Dr. Neel Patel, president of AAP Chapter 1 and former First 5 SMC Commissioner as host, and Dr. Jonathon Lee as moderator.



American Academy of Pediatrics
California Chapter 1 invites you to

Chapter Chat:

Fluoride Facts and Fallacies: What You Need to Know to Talk with Families Webinar

One of tonight's chapter chat co-sponsors is the **San Mateo County Oral Health Coalition**, funded by their **County's Measure K**, a half-cent countywide sales tax approved by local voters to support essential County services, such as and including access to health information about evidence-based public health interventions, including fluoride. This Chapter Chat features **Dr. Susan Fisher-Owens**, with host **Dr. Neel Patel** and moderator **Dr. Jonathon Lee**, on Wednesday, October 21, from 6-7:30 p.m. via Zoom.

📅 Wednesday, October 21
🕒 06:00 - 07:30 PM
📍 via Zoom

WHO SHOULD ATTEND?
Pediatricians, dentists, healthcare providers, public health professionals, and anyone interested in learning more about fluoride and children's oral health are welcome to attend.

Register Here!

Presented in partnership with

AAP-CA1 American Academy of Pediatrics
FIRST 5 SAN MATEO COUNTY
LOCAL LEADERS LOCAL NEEDS

American Academy of Pediatrics, California Chapter 1 | www.aapca1.org/events

RESILIENT FAMILIES

Friday CAFÉ

On October 16th, F5SMC staff attended the virtual Friday CAFÉ for family and community engagement professionals. This CAFÉ featured Shawneece Stevenson as the Conversation Catalyst. Friday CAFÉs are put on monthly by the San Mateo County Office of Education, providing a restorative space for providers to refresh, connect, and build their professional network. The next Friday CAFÉ will be held virtually on November 20th from 9-10:30am. Reach out to Soodie Ansari (sansari@smcoe.org) for more information or to register to attend.

Community of Practice for Family Support and Engagement Professionals

On September 22nd, F5SMC staff attended the Community of Practice for family support and engagement providers. This CoP was held in person at the Old Train Depot in Half Moon Bay. Providers who attended discussed barriers to service access for families and how to connect their clients with the resources they need. One provider stated, “It is a breath of fresh air to be in this space with all of you.” Communities of Practice are hosted every other month by Sellers, Dorsey and Associates. The next CoP will be held virtually on November 24th from 2-3:30pm. Reach out to Olivia Brown (obrown@sellersdorsey.com) for more information or to register to attend.

Child Abuse Prevention Council

F5SMC staff attended the Child Abuse Prevention Council on October 1st. The group is working to identify a topic for the upcoming Child Abuse Prevention Month. The selected topic will be the focus of a public education campaign in April 2027.

SPECIAL PROJECT**Baby Bonus Pilot Program**

Baby Bonus core partner agencies convened for a biannual in-person meeting at Stanford on Sept. 23rd to review progress on the program and evaluation, and to plan for next steps. We are more than halfway through enrollment for Baby Bonus. Over 250 families are receiving monthly cash gifts, and over 320 have been connected to a Community Health Worker through HPSM. Partners expressed that the collaboration remains strong, with each implementing agency bringing their expertise and data to make the pilot more impactful.

FINANCE AND ADMINISTRATION

On October 19, 2026, Michelle Blakely, Interim Executive Director, reported to the Finance and Administration Committee that First 5 San Mateo County’s financial records for the fiscal year ended June 30, 2026, have been fully audited with no findings; however, issuance of the final Basic Financial Statements Audit Report is pending receipt of complete GASB 68 pension and GASB 75 retiree health reporting information from the County Controller’s Office. Because these allocations rely on Controller workbooks informed by annual actuarial valuations, the delay will require First 5 San Mateo County to request an extension beyond the October 31, 2026 audit-report submission deadline. The Finance and Administration Committee acknowledged the update and recommended providing a verbal status report at the October 26, 2026 Commission meeting.

POLICY & ADVOCACY UPDATES

Notice of Proposed Rulemaking (NPRM) would remove or revise nearly every Head Start Program Performance Standard.

On October 5, 2026, Interim Executive Director, Michelle Blakely submitted an advocacy letter to Congressman Mullin urging him to oppose the proposed eliminations to the Head Start Performance Standard. (*See attachment #12.1*)

ACCOUNTABILITY, RESEARCH AND EVALUATION

San Mateo County Child Care Blueprint Theory of Impact Workgroup

One F5SMC staff member is participating in the Theory of Impact workgroup to design an evaluation of the San Mateo County Child Care Blueprint. Led by researchers at Stanford University and in collaboration with The Children's Collective, the Child Care Partnership Council, and Blueprint Lead Agencies, the group is creating a Theory of Impact tying strategies and activities to levers of change and desired outcomes.

California Health Interview Survey 2025 Data Release

The California Health Interview Survey (CHIS) conducted by UCLA held its annual data release webinar on October 15th. The survey provides representative, population-level data on a variety of health topics and is available at the County level. They have a user-friendly interface that allows interested parties to explore the information in the survey. Visit <https://healthpolicy.ucla.edu/our-work/california-health-interview-survey-chis> to learn more about the survey and to access the data.

FIRST 5 CALIFORNIA & FIRST 5 ASSOCIATION UPDATES

First 5 CA Summit

Three First 5 SMC staff members attended the biannual First 5 CA Summit: Their Futures First, from August 31 to September 2 in Anaheim. The Summit featured dynamic large group sessions and speakers along with more focused breakout sessions with a focus on topics ranging from addressing childhood trauma to achieving universal childcare, and protecting immigrant families to navigating emerging technology. Attendees were also invited to special reception, the Reiner Legacy Celebration, honoring the late Rob Reiner and Michelle Singer Reiner, who were instrumental in the passing of Proposition 10, the landmark legislation which created the First 5 network statewide.

Governor Signs First 5 Association Co-Sponsored Bill Focused on Ending Child Poverty

On September 28, 2026, First 5 Association of California sent out a [press release](#) on Governor Newsom signing AB 1996. AB 1996, authored by Assemblymember Mia Bonta, establishes the California Child Poverty Reduction Advisory Council within the

State Department of Social Services. The 19-member council, which includes a seat for the First 5 Association of California, will develop a plan to reduce child poverty by half within 10 years and assess the impact of state policies and budgets on child poverty. The legislation responds to persistent financial hardship among California families with young children, many of whom report difficulty meeting basic needs such as housing, food, health care, utilities, and child care.

California's child poverty rate is one of the [highest in the nation](#), with 73 percent of California families with young children reporting difficulty meeting at least one basic need such as utilities, healthcare, food and child care, according to a [2025 survey](#).

COMMUNITY AND STATEWIDE EVENTS & UPDATES

Michelle Blakely Honored at Hope Rising Gala

On September 18, 2026, F5SMC's Interim Executive Director, Michelle Blakely, was honored at the Hope Rising Gala held at San Mateo Event Center. Christine Padilla, Director of Build Up San Mateo County said, "Michelle Blakely embodies the belief that when we invest early, we transform futures. Her leadership at First 5 San Mateo County helps ensure that children and families, especially those facing the greatest barriers, receive the care, stability, and opportunities they deserve." Other leaders honored that evening were Hector Camacho — San Mateo County Board of Education, Aileen Cassinetta — poet and civic leader, Michael Stancil — Executive Director, Daly City Partnership, Carolyn Hoskins — Domini Hoskins Black History Museum & Learning Center, Supervisor Noelia Corzo — County of San Mateo, and Judith Guerrero — Executive Director, Coastsides Hope.



Christine Padilla and Michelle Blakely

The Hope Rising Gala brings our community together to help build safe, secure, and inclusive communities where every resident can thrive.

Child Care Coordinating Council (4Cs) Leadership Awards

On December 9, 2026, 4Cs will recognize outstanding leaders who have made a meaningful impact in early care and education settings through three awards. First 5 San Mateo County will receive the Community Partnership Award, which will be presented to Michelle Blakely. Heather Cleary, Chief Executive Officer, Peninsula Family Service will receive Mary Petsche Visionary Leadership Award. The Mary Elizabeth Griffin Children's Award will be presented to a recipient selected from submitted nominations. [Nominations for the Mary Elizabeth Griffin award are now open](#) and must be submitted by October 30, 2026.

COMMUNICATIONS

The First 5 San Mateo County Communications Team has begun working with its new communications firm, S. Groner Associates (SGA), which will continue the implementation of the communications plan. Current activities include developing a quarterly newsletter, creating a Baby Bonus blog, producing content for First 5 San Mateo County social media channels, and conducting an audit of the First 5 San Mateo County website. Additional updates will be shared as this work progresses.

October is Head Start Awareness Month

An opportunity to recognize the vital role of Head Start and Early Head Start in supporting young children, families, and staff. Since 1965, these programs have served more than 40 million children by providing comprehensive early learning, health, nutrition, and family support services to eligible families. Spread the word about the importance of Head Start!



Social Media and Analytics Reports (See Attachment 12.2)

October 5, 2026

Subject: Please oppose proposed eliminations to Head Start Performance Standards in the current NPRM

Dear Congressman Mullin,

Eliminating or weakening Head Start Performance Standards through the proposed rule would undermine the comprehensive supports that help children and families thrive.

Drawing on my experience as a former Head Start staff member in San Mateo County and Houston Texas, including work as a home visitor and leader of mental health, disabilities, and early learning teams, I have seen firsthand how these standards ensure consistent, high-quality services for infants, toddlers, children, and families. Head Start's evidence-based approach—grounded in prevention, family engagement, health and developmental supports, and high-quality early learning—has demonstrated lasting benefits for children, communities, and the economy. Proposed changes that remove requirements related to disability services, health coordination, mental health, screening timelines, and teaching and learning quality are especially concerning. Eliminating the housing-cost adjustment would be particularly harmful in high-cost communities such as San Mateo County, where families who earn slightly above the income threshold but spend a disproportionate share of their income on rent could be denied services they cannot otherwise afford. If adopted, these changes could lead to shorter program hours, larger classes, fewer teachers and support staff, reduced home visiting and family engagement, and additional barriers to enrollment and services in children's home languages. Although the proposal suggests potential savings could support additional enrollment slots, it neither provides funding nor requires programs to create them. Head Start is a proven investment in children, families, and communities, and its standards should be preserved and strengthened—not reduced.

Please:

- Oppose eliminations that reduce quality, access, or equity.
- Protect health coordination, disability supports, mental health services, and timely screenings.
- Pair any efficiencies with safeguards that expand capacity—not diminish quality.

Thank you for standing with children and families. I'm happy to discuss or provide local testimony

Michelle Blakely, Interim Executive Director First 5 San Mateo County of San Mateo
mblakely@smcov.org



Monthly Analytics Report: September 2026

Reporting Period: 9/1/2026 – 9/30/2026 | Prepared by: SGA Marketing

Executive Summary

Across all digital channels, September 2026 showed substantial growth in reach and engagement coinciding with a notable increase in overall content publishing frequency. Website traffic tracking for GA4 was established on 9/8/26, showing healthy engagement once bot traffic was filtered out. Conversely, E-Newsletter metrics experienced declines in open and click rates alongside an increase in bounce rates, highlighting an opportunity to optimize newsletter content.

Key Takeaways

- An increase in publishing frequency directly drove significant spikes in views, reach, and interactions across Facebook, Instagram, and LinkedIn.
- A local community event was the top-performing content across Facebook, Instagram, and LinkedIn, suggesting community-focused and timely content may be effective with First 5 SMC audiences.
- E-Newsletter open and click rates declined, while an increase in bounce rates points to a potential list-quality issue that should be investigated before concluding content performance.
- Google Analytics was set up for the First 5 SMC website. Significant bot traffic was detected – we should keep an eye on this in the future.
- For Google Analytics, we recommend setting up Key Events for actions like newsletter sign-ups, form submissions, donation or "Give" clicks, resource downloads, and clicks to program pages. Setting them up would give us a baseline to track conversions and show the site's impact to stakeholders.
- The high bounce rate suggests the newsletter list quality may be low (e.g., invalid addresses, full inboxes). Checking the list for outdated or newly imported contacts would be beneficial.

Website Analytics

Metric	9/1 – 9/30	8/1 – 8/31	% Change
Total Users	486	N/A	N/A
New Users	487	N/A	N/A
Returning Visitors	52	N/A	N/A
Sessions	485	N/A	N/A
Engaged Sessions	277	N/A	N/A



Metric	9/1 – 9/30	8/1 – 8/31	% Change
Engagement Rate	57.11%	N/A	N/A
Avg. Engaged Time per Session	42s	N/A	N/A
Views	1,067	N/A	N/A
Top Session Source/Medium	Google / Organic Search	N/A	N/A
Key Events	0	N/A	N/A
Session Key Event Rate	0%	N/A	N/A
Mobile Traffic/Desktop	350 / 134	N/A	N/A

Top Pages This Period

Total	1,067 100% of total	486 100% of total	2.20 Avg 0%	42s Avg 0%	3,428 100% of total
1 /	324 (30.37%)	196 (40.33%)	1.65	17s	1,102 (32.15%)
2 /baby-bonus/	62 (5.81%)	56 (11.52%)	1.11	25s	222 (6.48%)
3 /who-we-are/	59 (5.53%)	43 (8.85%)	1.37	19s	147 (4.29%)
4 /staff/	48 (4.5%)	45 (9.26%)	1.07	39s	155 (4.52%)
5 /our-work/	36 (3.37%)	26 (5.35%)	1.38	19s	86 (2.51%)

Notes

GA4 tracking began 9/8/26, so figures reflect a partial month and are not comparable to August. Foreign bot traffic (about 1 in 3 reported users) was filtered out where possible.

Facebook Analytics

Metric	9/1 – 9/30	8/1 – 8/31	% Change
Views	634	469	+35.18%
Viewers	1,687	169	+898.22%
Content Interactions	30	15	+100.00%
Link Clicks	9	2	+350.00%
Visits	184	157	+17.20%
Followers	3,070	3,074	-0.13%
Post Saves	0	0	0%



Metric	9/1 - 9/30	8/1 - 8/31	% Change
Post Shares	8	3	+266.00%

Top Content By Views

Join Thrive Alliance and Choose Children...
Mon Sep 14, 4:54pm
👁 510 ❤️ 4
👤 0 ➦ 2

This #HispanicHeritageM...
Tue Sep 22, 4:44pm
👁 190 ❤️ 2
👤 0 ➦ 2

Join us for a Diaper Drive that makes a re...
Sat Sep 12, 3:39pm
👁 158 ❤️ 2
👤 0 ➦ 1

Attention: professionals who...
Wed Sep 16, 3:30pm
👁 154 ❤️ 2
👤 0 ➦ 1

Big feelings are part of growing up! Tantrum.
Sat Sep 26, 1:39pm
👁 125 ❤️ 1
👤 0 ➦ 2

Notes

Posts increased from 1 to 16 (Facebook), 1 to 6 (Instagram), and 1 to 5 (LinkedIn), so month-over-month changes reflect higher posting volume.

Instagram Analytics

Metric	9/1 - 9/30	8/1 - 8/31	% Change
Views	393	132	+197.73%
Reach	95	24	+295.83%
Content Interactions	11	6	+83.33%
Link Clicks	0	0	0%
Visits	16	30	-46.67%
Follows	15	16	-6.25%
Post Saves	0	0	0%
Post Shares	0	0	0%



Top Content By Views



LinkedIn Analytics

Metric	9/1 - 9/30	8/1 - 8/31	% Change
Impressions	622	174	+257.47%
Reactions	14	4	+250.00%
Comments	0	0	0%
Reposts	0	2	-100.00%
Page Views	36	19	+89.47%
Unique Visitors	22	12	+83.33%
Followers	409	405	+0.99%
New Followers	6	5	+20.00%

E-Newsletter Analytics

Metric	9/1 - 9/30	8/1 - 8/31	% Change
Total Subscribers	1210	1,208	+0.2%
Subscribers Gained	2	86	-97.7%
Unsubscribed	0	1	-100%
Emails Sent	381	267	+42.7%



Metric	9/1 – 9/30	8/1 – 8/31	% Change
Delivered	297	250	+18.8
Open Rate	43%	64%	-32.8%
Click Rate	7%	27%	-74.1%
Bounced	84	17	+394.1%

Notes

Higher bounces reduce the delivered audience, which affects open and click rates.

Glossary

GA4Metrics:

- **Total Users:** Distinct people who visited the site during the period.
- **New Users:** Users visiting the site for the first time.
- **Sessions:** Individual visits to the site; a session ends after 30 minutes of inactivity.
- **Engaged Sessions:** Sessions that lasted 10+ seconds, included 2+ pageviews, or triggered a key event.
- **Engagement Rate:** Engaged sessions ÷ total sessions. GA4's replacement for the old bounce rate.
- **Avg. Engagement Time per Session:** Average time the site was actively in focus in a visitor's browser.
- **Views:** Total pages viewed, including repeat views of the same page.
- **Top Session Source/Medium:** The channel that sent the most sessions, e.g., google, organic, or direct/none.
- **Key Events:** The specific actions marked as most valuable to the business (GA4's term for conversions/goals).
- **Session Key Event Rate:** Percentage of sessions that included at least one key event.

Facebook Metrics:

- **Views:** The number of times your content was played or displayed. Content includes reels, posts, stories, and ads.
- **Viewers:** The number of Meta Accounts that have viewed your content at least once.
- **Content Interactions:** The number of likes or reactions, saves, comments, shares, and replies on your content, including ads.
- **Link Clicks:** The number of clicks, taps, or swipes on links within your content, including ads.
- **Visits:** The number of times your Page or profile was visited.
- **Follows:** The number of times accounts followed you in the selected time period.

Instagram Metrics:

- **Views:** The number of times your content was played or displayed.
- **Reach:** This metric counts reach from the organic or paid distribution of your Instagram content, including posts and stories that were boosted. Reach is only counted once if it occurs from both organic and paid distribution.



- **Content Interactions:** The number of likes or reactions, saves, comments, shares, and replies on your content, including ads.
- **Link Clicks:** The number of clicks, taps, or swipes on links within your content, including ads.
- **Visits:** The number of times your Page or profile was visited.
- **Follows:** The number of times accounts followed you in the selected time period.

LinkedIn Metrics:

- **Impressions:** The number of times your post was displayed on someone's screen, whether or not they engaged with it.
- **Reactions:** Responses like Like, Celebrate, Support, Funny, Love, Insightful, or Curious.
- **Comments:** Written responses to your post.
- **Reposts:** When someone shares your post, amplifying it to their own network.
- **Page Views:** The total number of views of your organization page.
- **Unique Visitors:** The number of unique individuals who visited F5's page, excluding multiple visits from the same person.
- **Followers:** The total number of LinkedIn members currently following F5SMC's page.
- **New Followers:** The number of users who started following F5SMC's page within the specific time period.

Constant Contact Metrics:

- **Total Subscribers:** The total number of active contacts currently subscribed to your email list at a given point in time.
- **Subscribers Gained:** The number of new contacts who joined your email list during a specific period (e.g., through sign-up forms, imports, or manual adds).
- **Unsubscribed:** The number of contacts who opted out of your email list during a specific period, no longer receiving future sends.
- **Emails Sent:** The total number of emails sent out as part of a campaign, regardless of whether they were successfully delivered.
- **Delivered:** The number of sent emails that successfully reached the recipient's mail server. This doesn't guarantee inbox placement, as some may land in spam folders.
- **Open Rate:** The percentage of delivered emails that were opened by recipients, calculated as $\text{opens} \div \text{emails sent (or delivered)}$.
- **Click Rate:** The percentage of delivered emails where a recipient clicked at least one link, calculated as $\text{unique clicks} \div (\text{sends} - \text{bounces})$.
- **Bounced:** The number (or percentage) of emails that could not be delivered to the recipient's inbox — typically split into hard bounces (permanent issues like invalid addresses) and soft bounces (temporary issues like a full inbox).

DATE: October 26, 2026
TO: First 5 San Mateo County (F5SMC) Commission
FROM: Michelle Blakely, Interim Executive Director
RE: Committee Updates

Program, Operations and Planning (POP) Committee Meeting – October 5, 2026

Commission: Nkia Richardson (Chair), Marco Chavez,
 Bethany Fair (Representing Jackie Speier) (Absent)

Public Member: Harvey Kaplan, Liz Scully (Absent)

Staff: Michelle Blakely, Emily Roberts, Myra Cruz

The Committee approved the meeting agenda and approved the minutes from the previous meeting held on April 6, 2026. Interim Executive Director Michelle Blakely announced that Emily Roberts, Strategic Initiatives Manager, will assume responsibility for POP Committee meetings going forward. Myra Cruz will support the transition with training for administrative functions.

First 5 SMC FY 2025-26 Additional Revenue-Funded Efforts

Staff presented an overview of the organization's strategy to supplement declining Proposition 10 revenues through external and braided funding. The approach, incorporated into the 2020–2025 and 2025–2030 Strategic Plans, is intended to sustain core early childhood investments, expand systems-level work, pilot new strategies, and strengthen partnerships.

In fiscal year 2025–26, Proposition 10 revenues funded 40 percent of community investments. The remaining 60 percent included Baby Bonus resources and other external, non-Baby Bonus funding sources. *(These percentages have been updated since the POP meeting to the following: 50 percent community investments and 50 percent remaining Baby Bonus resources and other external, non-Baby Bonus funding sources).* Staff noted that this diversification was intentional and enabled expanded service delivery, systems coordination, and continued investment in priority strategies.

Staff reviewed funding received through the Children and Youth Behavioral Health Initiative (CYBHI), which supports early childhood mental health (ECMH) efforts. Grant activities include training clinicians in Child-Parent Psychotherapy; mental health awareness events; and development of a provider network intended to retain and support clinicians serving young children.

Staff also reported on Mental Health Services Act (MHSA) funding, which provided approximately \$1 million in additional funding to First 5 San Mateo County during FY 2025–26. Resources supported trauma- and resiliency-informed systems work (TRISI); ECMH services; reflective supervision training; ECMH consultation in early care settings; a sustainable funding learning community for F5SMC ECMH grantees; and immigration-related supports for families and providers of young children.

The Committee received updates on funding secured through 2028 through partnerships with Sequoia and Peninsula Healthcare Districts. Sequoia funding substantially supports Help Me Grow, workforce health efforts, trauma-informed systems work, and a pilot to embed mental health referrals and services within two of First 5 San Mateo County's largest initiatives. Peninsula Healthcare District funding provided at a lesser amount contributes to Help Me Grow services for families within its service area. Committee members discussed the importance of improving mental health referral pathways for pediatricians and other providers, which staff confirmed is happening through a Help Me Grow pilot funded by Sequoia HD.

Staff shared that First 5 California IMPACT funding supports quality improvement, professional development, coaching, and incentives for early learning providers, though noted uncertainty regarding state funding beyond June 2027 and the need to preserve support for family childcare providers and mixed-delivery early learning settings.

Members and staff also discussed emerging artificial intelligence tools in early learning, emphasizing the need to prioritize human connection, limit screen exposure for young children, and focus AI applications on improving workforce efficiency rather than replacing educator-child interaction.

The Committee recognized Dr. Harvey Kaplan for approximately 20 years of volunteer service to First 5 San Mateo County and his many significant contributions to early childhood efforts in SMC.

Finance and Administration Committee Meeting – October 19, 2026

Commission: Carla Boragno (Chair), Claire Cunningham, Sylvia Espinoza (absent), Hanish Rathod

Staff: Michelle Blakely, Khanh Chau

1. Review and Recommend Approval of F5SMC's FY 2025-26 Budget Close Out as of June 30, 2026.

Michelle Blakely notified an edition to Economic Factors of FY 1015-26 Budget Close Out Performance of the attachment 3, which should be read as following: *At the end of FY 2025–26, 50% budget execution is funded by Tobacco Tax Revenues and Other Grants now account for 50% of budget execution*

Michelle Blakely highlighted key economic factors from the FY 2025-26 Budget Close Out, emphasizing the agency's success in diversifying its funding streams to reduce reliance on traditional Tobacco Tax revenues (Proposition 10). The Budget Close Out reveals a balanced funding split, with 50% derived from Tobacco Tax revenues and 50% from Other Grant Revenues. This braided funding approach is now a core component of the F5 investment landscape. For example, in the first round of the new FY 2025-28 funding cycle, MHSA, Special Needs, and TRISI grants provided \$1.588 million in braided funding across 14 community investment contracts. However, F5's budget performance was also impacted by workforce challenges at community-based organizations (CBOs). Factors such as high living costs, burnout, and staff retention issues across both low-wage and professional early childhood sectors contributed to some delayed grant executions throughout the fiscal year.

To detail the Budget Close Out, Michelle Blakely presented Attachment 3 alongside Attachments 3A, 3B, and 3C. The summary table and accompanying Notes highlight strong financial performance, with Total Revenues achieved \$7.329 million or 97% budget due to higher Interest Revenues and Tobacco Tax disbursements that offset slower Baby Bonus enrollment. Total Appropriations reached a 75% execution rate (\$6.331 million) for a \$2.163 million underspend, primarily driven by strategic MHSA grant prioritization, slow initial SPIP rollouts as the new funding cycle began, lower Baby Bonus execution, and vacancy savings. Consequently, the Ending Fund Balance closed strong at \$14.394 million (116% of the Revised Budget), reflecting a \$999,000 Surplus, while Administrative costs remained safely controlled at 12%—below the Commission's 15% cap.

Committee members reviewed the Budget Close Out and asked following questions:

- a. The reasons behind the 75% Total Appropriations budget execution rate. Staff explained that, as a highly regulated government agency whose fiscal budget must be approved by the F5 Commission in a public hearing; with budgets adopted in May and revised in February leaves a tight timeline, leading to staff maintains a budgetary buffer for Program Appropriations based on approved SPIP planning and investments and contract execution plans. This creates a safety buffer within grantee program budgets, making a 75% Total Appropriations budget execution close-out a reasonable achievement under these regulatory and timing conditions.
- b. FY 2026-27 vacancy savings. Staff clarified that the FY 2025-26 Budget Close Out personnel costs cover 7 FTEs (including the former ED who retired in late August 2025 and one program vacancy). F5 currently has two vacant positions in the county budget system alongside six active payroll staff. The Committee advised reducing the county budget system to reflect only one vacancy and incorporating this change into the February 2027 Revised Budget.
- c. Obligated contract funding stability if Tobacco Tax and grant revenues decline. Staff noted that the agency is actively pursuing MAA revenue, with SMC Health and AbilityPath successfully supplying the necessary supporting documentation for claims. The Committee cautioned that MAA compliance and auditing are exceptionally strict and emphasized that all county contracts contain standard termination clauses to protect against funding shortfalls.
- d. Whether a 12% flat administrative cost rate is sufficient amid declining Tobacco Tax revenues, asking staff to provide a historical overview of Tobacco Tax Revenue and admin cost trends over time.
- e. On a positive note, the Committee welcomed the higher-than-expected interest revenue at budget close-out and asked how staff factors interest rate fluctuation in budgeting. Staff clarified that they take a conservative budgeting approach, intentionally budgeting interest rates lower than current actuals to guard against potential interest rate cuts during the fiscal year—meaning higher actual returns are a welcome bonus.
- f. How the operating budget is charged, specifically regarding headcount. Staff explained that expenses within the "Services and Supplies" section are itemized costs, whereas charges under "Other Charges" (primarily County service charges) are allocated based on the number of employees.

Committee members did not have any other questions. A motion for approval of the F5SMC FY 2025-26 Budget Close Out as of June 30, 2026 was made by Commissioner Cunningham, seconded by Commissioner Rathod. Unanimously approved.

2. **Verbal Update: First 5 San Mateo County (F5SMC)'s Basic Financial Statements for the year ending June 30, 2026 Audit Report**

Michelle Blakely reported that while all financial records reported in the county accounting systems have completely audited with no findings, the First 5 San Mateo County (F5SMC) Basic Financial Statements Audit Report for the year ending June 30, 2026, is currently pending. This delay is due to the County Controller's Office not yet providing complete information regarding GASB 68 (pension reporting) and GASB 75 (retiree health reporting). Staff further briefly explained how for GASB 68 and GASB 75 financial allocations are distributed to each audit entity based on County Controller Office workbooks developed from annual actuarial valuation reports by outside consultants.

Because of this delay in issuing F5SMC's final basic audit report, the agency may need to request an extension for audit report submission beyond October 31, 2026 deadlines. The Committee members acknowledged the explanation and suggested that staff provide a verbal update during the Commission meeting on October 26, 2026, in concurrence with the Finance and Administration Committee.

Commissioner Boragno adjourned the meeting at 9:44 AM.

Early Childhood Evaluation Advisory Committee Meeting—October 19, 2026

Commission:	Colleen Chawla, Naveen Mahmod
Program Representatives:	Heather Cleary, Carol Elliot
Staff:	Michelle Blakely, Jenifer Clark
EVALCORP (via Zoom):	Kristen Cunningham

There were several programmatic announcements:

- **AbilityPath** is running weekly Play & Learn parent-child groups at 4 libraries and they have seen strong parent participation. They are adding an early childhood mental health component, with One Life counselors attending groups to demystify and support access to mental health services for young children and their families. AbilityPath has also opened an inclusive preschool at Elko Yards; some subsidized slots are still available.
- **Peninsula Family Service** has recently acquired Creative Montessori in East Palo Alto; this is their 10th early learning center. While they are maintaining the Montessori approach, they will bring the Great First Eight curriculum to the center next year in support of a possible Big Lift application. PFS still has preschool spots available for Fall enrollment.

Jenifer Clark presented the F5SMC Annual Report to First 5 California. Key points include:

- Total programmatic expenditures for FY 2025-26 were \$4.8 million, with 31% allocated to Improved Systems, 26% to Improved Child Development; 25% to Improved Family Functioning, and 18% to Improved Child Health.
- F5SMC-funded programs served 11,652 clients in FY 2025-26, with 46% of those being service providers, 29% being children, and 25% being parents/primary caregivers.
- The race/ethnicity proportions of parents and children served through F5SMC-funded programs closely aligns with the proportions of the Medi-Cal eligible child population in San Mateo County.

- This report will be brought to the Commission for approval at its meeting on October 26, 2026.