

Summary of Major Accomplishments and Unanticipated Challenges

Tammy Greer, Executive Director

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It has been my extreme honor to serve the taxpayers, voters, and children of Escambia County for the past nine months. In the same amount of time that it takes to bring a healthy child into the world, I have worked with the Board and staff to bring the Escambia Children's Trust (ECT) into being as a government agency. The agency was voted into existence in November of 2020. The full Board of Directors was officially seated in March of 2021, and I started work with the ECT in February of 2022. I would be remiss if I did not thank Carolyn Appleyard for her work as the interim administrator who handed things over to me upon my arrival and has remained an invaluable resource and historian of the agency. I also must acknowledge Meredith Bush, Esq., our amazing General Counsel, who has guided us not only through legal questions but also around the landmines of starting up a brand-new government agency. None of this could have been accomplished, however, without the leadership of a dedicated, passionate, and involved Board of Directors nor without an unbelievably talented and committed staff. I am incredibly grateful for the team of which I am a part and hope to continue to remain.

We have learned a great deal over the past nine months, sometimes through trial and error. We are off to an excellent start and are on track to grow into a highly effective children's services council. The following narrative lists the major accomplishments and unanticipated challenges encountered along the way. This is not a comprehensive list as the first year in business is filled with many small yet important tasks, but it gives an overview of what I believe to be the most significant accomplishments.

Months 1 & 2 Accomplishments

I spent most of my first two months as the Executive Director learning about what had been done so far and setting up basic operations for ECT. In addition, I also met with and/or reached out to many organizations and members of the community to introduce not only myself but also the ECT – to share what a children's services council is and what we hope to accomplish by 2030.

- Reviewed all prior meeting minutes and watched videos of meetings for historical background
- Ensured reports had been filed
- Updated records with the State to reflect new contact
- Obtained tax exemption certificate
- Connected with other CSCs/Trusts and reviewed their operations, staffing structures, and funding initiatives; requested sample policies and documents
- Started working on policies and procedures with Counsel and Policy Committee
- Purchased laptops and software to get started
- Developed initial staffing plan
- Proposed ideas for first round of funding
- Met with Board members for initial personal introductions
- Updated website to ensure all required information was posted

- Began attending weekly Florida Alliance of Children’s Councils and Trusts (FACCT) executive director calls
- Started touring office space
- Started looking into client management databases and technology/IT vendors
- Met with Anglin accounting firm re: procedures
- Met with Branch Benefits re: insurances
- Got on bank accounts and set up purchasing card
- Paid agency bills
- Looked into process for check signing with General Counsel
- Attended virtual Children’s Funding Institute
- Issued RFP for needs assessment evaluation project
- Advertised and started interviewing for Board Liaison position
- Met with the following community agencies/leaders:
 - Achieve Escambia executive director several times, met with their former researcher, and presented to their leadership council
 - Linsey Cannon of Children’s Home Society
 - Julian and Kim MacQueen
 - Leadership of Community Action Program Committee and toured Head Start facilities
 - Leadership of Pace Center for Girls and toured facility
 - Leadership of Studer Community Institute
 - Pensacola State College President Ed Meadows re: ECT mission and office space
 - Michele Watson of FACCT
 - Quint Studer

Months 3 & 4 Accomplishments

As I started to get reacquainted with Escambia County after years away, I continued to meet with key service providers, community leaders, and stakeholders to hear what the community expects from the ECT and what they see as the needs moving forward. I also began to explore ways that we could meet the most pressing needs of the community or to address “low hanging fruit.”

- Hired and onboarded first staff member, Aviyonne Tart
- Continued looking for office space and entered lease with Pensacola State College (saved a great deal of taxpayer dollars by getting space for approximately \$5,300 for our first year)
- Attended Equity Project Alliance Meeting
- Worked on FY2021-2022 budget revisions and submitted amended budget to Budget Committee and Board for approval
- Suggested RFP idea for organizational capacity (not issued) and for public education and awareness campaign (issued)
- Attended CivicCon presentations
- Continued to assess technology to automate processes to reduce the need for additional staff
- Presented to Pensacola Rotary
- Advertised and interviewed candidates for Finance Director position
- Continued regular meetings with FACCT and other CSC/Trust Eds
- Continued meeting with Board members
- Attended the Halfway Home Re-entry Project presentation

- Attended Gulf Coast Kid's House luncheon
- Attended Junior League event
- Presented to National Association of Counties' Suburban Peer Learning Network
- Moved into offices at Pensacola State College
- Ordered and set up phones and furniture
- Began attending Circuit 1 Community Alliance Meetings
- Issued ITB for Needs Assessment
- Continued to explore benefits for ECT staff
- Set up Positive Pay with Hancock Whitney Bank to add layer of protection to accounts
- Presented to KCAN (Kindergarten Community Action Network) group
- Joined Early Learning Coalition board
- Presented to Pensacola Women's Alliance
- Met with the following community agencies/leaders:
 - Leadership of Legal Services of North Florida
 - Ted Kircharr and Carolyn Appleyard re: strategic planning background
 - Jenn Grove of Baptist Hospital
 - Jenn McPherson of Navy Federal Credit Union
 - Laura Gilliam of United Way of West Florida
 - Myra Van Hoose of Achieve Escambia
 - Rusty Branch of Innisfree Hotels
 - Bruce Watson and Vickie Pugh of the Early Learning Coalition
 - Terry Horne re: CivicCon
 - Dan Duncan re: Clear Impact and Results First accountability process
 - Cecile Scoon of the Florida League of Women Voters
 - Leadership of Studer Family Children's Hospital and toured facility
 - General Cozak and team and toured Starbase STEM facility

Months 5 & 6 Accomplishments

By the sixth month, I was settled in. I hired two awesome professionals, and we started looking at community needs and programs – what's working and what's not in the community. We began laying the foundation for the Trust by assessing the needs of the children in the community and putting internal processes in place to start getting funding out.

- Presented to Greater Pensacola Chamber of Commerce Policy Committee
- Began conversations about the need for a Resource Guide
- Reviewed other CSCs/Trusts' needs assessments and resource guides
- Issued RFP for Kindergarten Readiness Summer Bridge program through which first two projects were funded
- Hired and onboarded new Director of Finance & Operations, Tammy Abrams
- Advertised and interviewed for and hired and onboarded new Director of Programs & Performance, Dr. Kimberly Krupa
- Assisted Director of Programs & Performance with initial development of the first official, baseline ECT Needs Assessment
- Assisted with preparation of FY2022-2023 budget and TRIM process
- Attended CivicCon/Studer Group presentations

- Hosted table and spoke at Parent University to solicit parent input on Needs Assessment
- Connected with Joel Hollen of the Purple Star School Program
- Was interviewed by *Pensacola News Journal*
- Attended Florida Chamber's "Learners to Earners" Early Learning Conference
- Attended Rep. Michelle Salzman's Mental Health Taskforce quarterly meeting
- Attended the Youth Summit at Brownsville Community Center
- Co-facilitated the Needs Assessment Listening Session with more than 100 providers present
- Examined financial software options (MIP, Amplifund, Financial Edge, etc.)
- Explored governance and agenda software (OpenGov, PrimeGov, Granicus, etc.)
- Facilitated Grants Workshop for Board members
- Met with the following community agencies/leaders:
 - Andrea Krieger of Pensacola State College Foundation
 - idGroup re: strategic planning
 - Lakeview and FamiliesFirst Network leadership team
 - Kyle Schoolar of Feeding the Gulf Coast
 - Todd Thomson of Greater Pensacola Chamber of Commerce
 - Kammy Young and team at Global Learning Academy
 - Dr. Debra Goldberg re: infant mental health issues

Months 7 & 8 Accomplishments

The seventh and eighth months were incredibly busy as the staff team gelled and got the Needs Assessment out to the community. We are particularly proud of the Needs Assessment document and process, which represents a major milestone for ECT. I am happy to report that thanks to a superbly talented team, we were able to produce our needs assessment internally rather than spending \$80,000+ and nearly a year to develop as our peer CSCs/Trusts did. The Needs Assessment is the basis for the work that we will do and set us on our trajectory for the upcoming fiscal year.

- Finalized and published the Needs Assessment, thanks to the exemplary work of Dr. Krupa
- Navigated the TRIM and government budgeting process for the first time, under the guidance of Tammy Abrams
- Attended Circuit 1 Community Town Hall
- Issued RFP for Out-of-School Time programs
- Issued ITB and contracted with Kessler Creative to develop a Resource Guide
- Attended Ministry Partnerships Meeting
- Advertised and filled Board Liaison vacant position
- Issued ITB for Conflict Counsel and Audit Services
- Was interviewed by Channel 5 local CBS affiliate
- Was interviewed by *InWeekly*
- Attended Gun Violence Roundtable
- Began implementation of SAMIS and MIP
- Attended Florida Afterschool Network Public Policy Forum meeting series
- Attended Florida Dept. of Juvenile Justice "Restoring Hope" Youth Mental Health Summit
- Attended Built to Thrive Virtual Summit
- Developed presentation for "Working with ECT" training series

- Met with the following community agencies/leaders:
 - Virtual discussion with Feeding the Gulf Coast team
 - Leadership of The Lodges and toured homeless shelter
 - Chandra Smiley of Community Health Northwest Florida
 - Abraham Sculley of Speaks 2 Inspire
 - ECSD Food Services director
 - ECSO Sheriff Chip Simmons
 - ECSD Foundation
 - KCAN re: future of Achieve Escambia
 - 211 and UWWF leadership re: Resource Guide
 - Achieve Escambia council representatives of future of their organization
 - Joe Davis, CEO of Boys and Girls Clubs of Florida
 - Michael O’Neal of Parent University

Month 9 Accomplishments

The ninth month brought about the birth of our first round of robust proposals for programming through our RFP for out-of-school time programs. We received nearly 40 proposals, which will help get more funding into the community to offer children and youth positive development opportunities. Staff have also begun laying the groundwork for providing technical assistance and fostering system-building in the community.

- Hired and onboarded new Board Liaison, Alma Ellis
- Reviewed 37 proposals received under OST RFP for technical qualification
- Met with ECSD School Transformation team
- Began implementing PrimeGov/OneMeeting agenda software
- Interviewed candidates and will hire new Program & Research Coordinator
- Will attend PSC Nonprofit Training Center dedication
- Will attend Ethics, Sunshine Law, and Public Records Law presentation
- Will attend annual FACCT CSC/Trust Conference

Unanticipated Challenges

- The greatest unanticipated challenge I initially faced was *adjusting to the political climate* of Escambia County as the executive director of a taxpayer supported special district of government. Getting a new government agency up and running – which is not as simple as setting up a new private business or nonprofit – was made more difficult by the number and extent of public record requests received, the negative newspaper and blog articles published, and the fact that ‘everyone knows everyone’ in the county. Having been away from the area for 25 years, I had a steep learning curve to figure out who the major influencers are, let alone how to engage them in the work of the Trust. I have spent many hours meeting with as many people as possible to introduce myself and the Trust and to hear their thoughts on what the Trust should be doing. While more than half of the voters of the county were in favor of the Trust, some still are not supportive. Monitoring social media and responding to false narratives take up a great deal of time but are necessary as we are basically in another campaign for the next eight years. We are implementing software systems to ease the burden of records requests and to make our

documents readily available to the public and have set up Google alerts to respond quickly to any articles that mention the Trust.

- Input from Trust Board members is critical to the success of the agency. I have faced challenges *connecting with a couple of Board members*. While every member is busy with their full-time jobs and lives, most have been extremely generous with their time. However, some individuals are difficult to reach because of their schedules. I genuinely want to have regular, scheduled meetings with each and every member, so I can make sure everyone is getting the information they need prior to Board meetings and to give them an opportunity to tell me about any concerns or issues to be addressed. I value the feedback of the Board and want to maintain relationships with the members, each of whom I deeply respect. I am optimistic that our new Board Liaison will help me get on each member's calendar at least monthly in the coming year.
- *Operating in the Sunshine* created unexpected obstacles to timely communication. It took me several months to figure out how to maneuver within the guidelines and still get things done. In addition to our individual meetings, committee meetings helped move us along. I hope that we can begin to do even more work through committees and revisit the full Board meeting calendar. We get a lot of work done in committees, so I would like to see those expanded and convened regularly, between full Board meetings. My goal is to produce an annual calendar with all meetings pre-determined so members will know when each meeting will be for the coming year. I want to make it as easy as possible for Board members to engage with the Trust.
- The Escambia Children's Trust must succeed. We must make a huge impact with the public dollars with which we have been entrusted. I am confident that the Board also feels this pressure, and I know the staff does. We are determined to effect change for the better. However, the gigantic unanticipated challenge we now face is *figuring out how to make the greatest positive impact* with our limited funding. We must do more than dole out grants like a foundation. We should work to support systems of care for children by convening and connecting providers, creating intermediaries to assist fledgling organizations, gathering data and producing research to inform the field, and supporting and encouraging high quality programming. We may consider place-based initiatives that serve neighborhoods with the greatest needs, thereby providing deeper services rather than broader.
- Another challenge before us requires *nurturing provider organizations' leaders* to be more open to change. We must expose outdated and unproven practices that are not working and challenge leaders to look at evidence-based practices that can be applied locally. We cannot keep doing the same things the same old way and expecting a new, different outcome. We must find a way to foster communication among providers and help them align their priorities and work without offending them. This will assuredly be a monumental task. I have experienced surprising resistance to change from a few local providers' leadership. Millions of dollars in federal and state funding are forfeited each year due to inflexibility and hesitation to try new approaches. A strategy may be to build the capacity of some of the local providers so that they can obtain – and retain – funding in addition to the Trust's grants.

- This leads me to the next unanticipated challenge: *braiding and leveraging state and federal funding*. While \$10 million a year sounds like a lot of money, it will go quickly and is not nearly enough to meet all the needs of the children and families of Escambia County. How can we work with other agencies to ensure we are complementing the work being done with an unprecedented amount of funding flowing into the community? How do we encourage providers to take advantage of all the pandemic relief funding (e.g., ESSER, ARPA, mental health, etc.)? Then how do we work with them to seek other funding to replace the pandemic relief funding and not expect the Trust to replace all the new funding when it ends in a few years? These questions are front of mind as we work toward building strong, coordinated systems of care.

There are many challenges – some anticipated, some not – but they are also opportunities: opportunities to make Escambia County a better place to live and grow up. We are up for the challenge, and I hope that the Board allows me to continue this rewarding work. Thank you for your support, insight, trust, and leadership. I look forward to continuing to work together to serve the children and families of Escambia County.

Thank you