

President & CEO Evaluation Process

Self Reflections of President & CEO

1. Mission, Vision, and Strategy

1.a Facilitates collaborative, responsive strategic planning that engages board, staff, and community stakeholders, including the school district

1.b Advances the mission in alignment with strategic priorities and community/district needs

1.c Provides clear vision and leadership for organizational direction

1.d Effectively communicates mission and vision to staff, board, donors, and community partners

1.e Implements and refines strategies aligned with mission and goals set forth in strategic planning

- Built staff, CCPS, and Board ownership of the Strategic Roadmap through a collaborative process that drew from a variety of information, including the Krupa report
- Leveraged the Strategic Roadmap to focus the work of CFL, including expanding impact, driving the development of the proposed FY27 budget, and implementing KPI updates at Board meetings
- Communicating our vision and efforts to address more unmet needs to volunteers, donors, CCPS, non-profit partners, and corporate partners – raising awareness that significant unmet needs exist and we are an organization on the move to address more of those unmet needs
- Developing shared ownership of the process for creating a multi-year strategic plan

Opportunities:

Maintain the organization's focus on the Strategic Roadmap. Effectively lead the process for developing the multi-year strategic plan.

2. Program Impact

2.a Aligns programs with strategic planning goals for students and educators

2.b Promotes consistent delivery of high-quality, impactful programs by effectively coordinating people and resources

2.c Assesses program outcomes through practical measures (including qualitative feedback and available data), applies lessons learned to strengthen impact, and shares insights to deepen donor and community engagement

2.d Encourages thoughtful innovation and continuous improvement in program design while maintaining mission focus and strategic priorities

- We admitted 68 grade eight students, 42 grade ten students, and 10 grade eleven students to student programs for a total of 120 admitted students. Doubled FY23-FY25 average. Exceeded the Strategic Roadmap target.
- Started to re-emphasize college and career access support. We supported 351 students and 164 parents during FY26 through college and career access activities focused on topics such as FAFSA completion and scholarship applications. Exceeded Roadmap targets for students and parents.
- Expanded the impact of our teacher recognition program by restoring three effective practices: a community-based nomination process; a sit-down dinner; a delayed television broadcast and a return to 6 GA honorees. 5716 thank-a-teacher nomination cards were submitted, recognizing 1,486 educators. 94% of the responding 47 Teachers of Distinction (out of 58 total) agree or strongly agree with the statement: "My experience this school year with the Golden Apple Teacher Recognition Program makes me feel more appreciated as a teacher." This includes 77% who "strongly agreed." 6% selected the "neutral" response.
- Increased the amount of classroom grants awarded both directly by CFL and through public funding. An average of \$175,967 of classroom grants were funded from FY23 to FY25 (excluding grants funded with disaster relief dollars), with an average of \$128,535 funded direction by Champions For Learning. This year, we funded \$202,640 of classroom grants, with \$148,567 funded directly by Champions For Learning.
- Initiated schoolwide innovation grants for systemic impact.
- Improved staff morale, ownership of our work, and collaboration supported expanded program impact.
- Used practical measures to develop the Strategic Roadmap, including the collection of baseline data and the review of the Krupa report. Introduced simple KPIs as an initial step to use data to strengthen impact.
- Implemented practices new to CFL to expand program impact, including creation of Pathways to Success – Foundations and Accelerate, as well as schoolwide innovation grants.

Opportunities:

Supervise and collaborate with the Chief Program Officer to maximize impact, including establishing procedures and systems for Pathways to Success and expanding the use of data to inform continuous improvement.

3. Community Engagement

3.a Builds strong, collaborative relationships with community, business, and education partners

3.b Engages donors and volunteers as partners, aligning their passions and interests with the organization's mission

3.c Promotes authentic storytelling and volunteer, donor, and partner recognition that celebrates contributions and deepens commitment

3.d Serves as a visible, respected ambassador for the organization

- Hired and supervised the Director of Community Engagement.
- Reinvigorated volunteer recruitment, engagement, support, and recognition. 97% of respondents reported in a December 2025 survey that they are satisfied or highly satisfied.
- We hosted 25 learning sessions/connection events during FY26 reaching 479 volunteers across student, educator, and entrepreneurship programs. Exceeded the target number of events and participants. We implemented quarterly newsletters for volunteers.
- More than doubled volunteers recruited to serve grade 8 students admitted in the spring. Achieved with an all-hands-on-deck approach that communicated urgency and included a Volunteer Recruitment Social, engagement of Board members and volunteers, and every staff member calling approximately a dozen volunteers regarding our need.
- Implemented Entry Plan entitled *Connecting, Listening, Learning* to jump-start connections.
- Restrengthened our partnership with Collier County Public Schools.
- Re-established Champions For Learning as a trusted, proactive partner among major community institutions through regular presence, follow-up, and collaboration, including the Naples Children Foundation, the Schulze Family Foundation, the Schoen Foundation, Collier Community Foundation, Naples Chamber of Commerce, Grace Place for Children and Families, Greater Naples Leadership, the Elks Lodge, and Florida Gulf Coast University. Reconnected CFL with Future-Ready Collier, serving on Steering Committee.
- Strengthened corporate relationships, including with Suncoast. Met with other corporate leaders, including the President & CEO of NCH Healthcare System & executives of Owen-Ames-Kimball, Bank of America, Stock Development, and PBS Contractors.
- Actively participate in community events sponsored by organizations such as the Chamber of Commerce, Farm City Barbecue, the local affiliate of the American Society of Fundraising Professionals, PBS Contractors, NCF Wine Festival tent set up, a regional healthspan event hosted by FGCU, and Friends of Autism.
- Serve as a guest speaker for organizations such as Leadership Collier, Associate Leadership Collier, Greater Naples Leadership, and the Cedar Hammock Women's Golf Club.
- Engaging the organization in telling stories about our work that are student-centered, problem-focused, and appeal to both heads and hearts.
- Personally attended volunteer events to start to get to know individual volunteers.
- Reconnecting CFL with the Consortium of Florida Education Foundations, including serving on their Strategic Planning Task Force and presenting a webinar regarding school grants.
- Participating in the Nonprofit Leadership Academy sponsored by the Collier Community Foundation, the Naples Children Foundation, and the Schulze Family Foundation.
- Addressed issues with the underperformance of the Manager, Volunteer Programs.

Opportunities:

Continue to support the ongoing creation and strengthening of systems and processes relating to volunteer recruitment, engagement, and support.

4. Fundraising and Resource Development

4.a Cultivates and stewards donors through authentic, donor-centered relationships that emphasize meaningful recognition and celebration of impact

4.b Builds a balanced donor pipeline across entry-level, mid-level, major, and planned giving, with strategies for qualification, cultivation, and retention

4.c Implements and sustains a consistent, systematic fundraising approach that provides structure for donor qualification, cultivation, solicitation, and stewardship

4.d Generates sustainable revenue, aligning donor partnerships with organizational priorities

- We raised \$3,780,222 as of May 11, 2026 with a projected year-end total of \$3,918,557. This projection exceeds the KPI and the FY25 baseline.
- Proactively commissioned external analysis of fundraising from globally recognized experts to jump start improvement of our fundraising practices.
- Introduced, with support from Giving Pathways and the Veritus Group, a data-driven approach to mid-level and major gifts donor engagement. Identified opportunities for enhanced donor retention and decreased value attrition of gifts. Identified KPIs relating to the number of donors and average gift size at specific gift levels.
- Initiated a qualifying process to determine if our donors who give \$500 or more want a deeper and more meaningful relationship with CFL. If the donor wants a deeper relationship, they are considered "qualified" for ongoing touchpoints throughout the year. Caseloads will include mid- and major-level donors with individuals within each category classified as Tier A, B, or C. Top tier, high-capacity donors will receive proportionally more time and greater personalization.
- Introduced, with support from Veritus, a stewardship and solicitation process for donors that involves discovering the donor's passions, interests and communication preferences; setting revenue goals for each donor based on the donor's history of giving and capacity; and creating a strategic communications plan for each donor, driven by the donor's passions, interests, and communication preferences.
- Engaged the Veritus Group to provide weekly coaching sessions for our Chief Development Officer and Director of Development & Major Gifts as it relates to the qualification and stewardship.
- Joined our CDO in meeting with major donors, including securing gifts of \$600,000 and \$450,000. Met separately with other individual major donors.
- Initiated a practice (starting this spring) of calling donors who give \$1,000 to personally thank them for their support.
- Build staff ownership of a revised approach to telling our story: focusing on unmet needs and problems and appealing to heads and hearts with student-centered stories (rather than mainly touting CFL accomplishments)
- Directly supervised the Development Team until the Chief Development Officer started.
- Launching Meet the Mission opportunities for Board members to refer potential donors to an informal, no-pressure gathering to learn more about the unmet needs of students and educators and how we address them.

Opportunities:

Improve donor retention, decrease value attrition of gifts, and increase donor acquisition.

5. Organizational Leadership and Management

5.a Recruits, develops, and retains high-quality staff

5.b Aligns staff roles, processes, and priorities to promote team efficiency and effectiveness

5.c Fosters a positive, mission-driven culture of collaboration, engagement, and philanthropy in which staff and the board value donors and volunteers as partners in student and educator success

5.d Supports staff with tools, learning opportunities, and accountability systems that enable continuous improvement and success

5.e Maintains organizational operations through appropriate staffing, outsourcing, and structures that support efficiency, compliance, and mission effectiveness

- Increased staff morale and shared ownership of work.
- Institutionalized regular staff meetings ("Team Huddles") to strengthen collaboration, shared learning, and mission alignment.
- Greatly enhanced transparency with staff i.e., Strategic Roadmap, sharing of Board Updates, budget development
- Applied extensive knowledge of human resources in navigating two instances of underperforming employees, each of whom were members of protected classes according to employment law. We provided coaching and performance support, clear communication regarding expectations, and proper documentation of process. Each employee resigned, minimizing legal liability.
- Led thorough searches for Director of Community Engagement, Chief Development Officer, and Chief Finance and Administration Officer (CFAO), using multi-stage processes that included group interviews, written case exercises, role plays, interviews with me, and reference and background checks. Extended 1 search after a negative reference. Applying same thoroughness to current searches.
- Better met organizational needs by converting the Chief Finance Officer position to a Chief Finance and Administration Officer position, expanding responsibilities to include outsourced HR, IT and facilities management, and leadership in organizational data use.
- Created Chief Program Officer position for FY27 to lead program expansion.
- Began reinforcing with staff and Board members the importance of honoring the interests and passions of donors and volunteers as an end in itself, not solely as a means to achieving program goals.
- Effectively supervised the Chief Development Officer, Chief Finance and Administration officer, Senior Director of Student Programs, Director of Educator Programs, and the Director of Community Engagement. Supervised other positions for portions of the year: every development team member, Volunteer Manager, and Manager, Finance & Administration.
- Converted Manager, Finance & Administration position to Operations and Guest Experience Coordinator with greater emphasis on supporting experiences of all internal and external stakeholders.

Opportunities:

Integrate the Chief Program Officer into the staff as a collaborative, boots-on-the-ground team player. Actively support the onboarding of the Operations and Guest Experience Coordinator.

6. Board Relations and Governance

6.a Works in partnership with the Board, respecting governance/management boundaries

6.b Engages the Board in strategic planning and their governance role in resource development (e.g., advocacy, opening doors, stewarding donors)

6.c Provides the Board with timely, accurate, and strategic information to support effective governance

6.d Promotes board development and succession planning to strengthen long-term governance capacity

6.e Supports board focus on strategic priorities and governance functions, avoiding operational detail

- Rebuilt Board confidence in the capacity of CFL to effectively serve as a catalyst for educational success. Board members are more likely to refer potential volunteers and donors.
- Increased the engagement of Board members.
- Provided highly informative, twice-a-month Board Updates featuring notes from me, emails from multiple staff members, a list of articles and web postings relating to our work, and upcoming events.
- Developing individual relationships with Board members.
- Promoted high levels of board member engagement by actively enlisting Board members in governance responsibilities relating to setting the direction of the organization and adopting simple measures of progress.
- Supported effective Board governance by providing clarity and shared ownership via adoption of specific processes for developing the Strategic Roadmap and multi-year strategic plan.
- Shared early iterations of concepts that evolved into the recommended Strategic Plan. Sharing the early iterations enabled early Board input, rather than asking the Board to rubber stamp near-finalized documents after perfunctory review.
- Met frequently with the Board Chair, partnering with her to create a highly effective, collaborative relationship.
- Supported the active, effective functioning of committees, including reactivating the Development Committee.
- Worked with the Board Chair to revise agenda formats and the flow of meetings in accordance with Robert's Rules of Order.
- Provided robust support to governance operations, including providing draft agendas to the Chair, developing a draft process for my evaluation, and playing a lead role with the logistics of my evaluation.
- After consultation with the Board Chair, worked with a dedicated, well-meaning Board member to try to channel expertise and energy in a way that respects staff's operational responsibilities.

Opportunities:

- Continue to develop strong individual relationships with Board members. Lead the multi-year strategic planning process in a way that builds shared ownership of our vision, goals, and metrics for success.

7. Fiscal Management

7.a Collaborates with the Board and staff to set budget priorities in alignment with organizational goals

7.b Provides accurate, transparent, and timely financial reporting to support decision-making

7.c Implements effective internal controls and complies with legal, audit, and regulatory requirements

7.d Aligns financial planning, decisions, and investments with strategic priorities

7.e Maintains adequate reserves and safeguards to support long-term organizational health

- Collaborated with CFAO to effectively develop the proposed FY27 budget process. Staff members across the entire team participated more actively. Staff members reviewed individual expenditures and donor histories during budget development. We used the Strategic Roadmap to guide budget development. Presented the proposed budget in a clear format, including a budget memo and a three-year budget projection.
- Placed greater emphasis on developing staff understanding of the budget to support effective operations.
- Initiated comprehensive review of the coding of expenses across programs, including the allocation of shared expenses and staff expenses. Accurate, detailed coding will inform the development of improved donor asks with greater specificity regarding program expenses.
- Actively participated alongside the Chief Financial Officer in analyzing the financial implications of the Strategic Roadmap. Demonstrated fiscally prudent leadership by anchoring the expansion proposal in multi-year cash and endowment analysis to maintain adequate reserves and fiscal health.
- Led the analysis of additional scholarship purchases that would be required by our program expansion to supplement scholarships we have already purchased.
- Led the review by Development Team of actual versus projected FY26 fundraising revenue.
- Engaged our Chief Financial Officer to work part-time beyond her resignation date and beyond the start date of the Chief Financial and Administration Officer.
- Initiated data practices (analysis of data relating to donor retention and gift value attrition, as well as fundraising goals for individual donors) that will increase our long-term ability to forecast fundraising revenue during budget development.
- Secured Board approval of an expense authorization policy to establish clear guidelines regarding my authority to manage and reallocate organizational expenses in a manner that supports operational flexibility while maintaining appropriate financial oversight by the Board of Directors.

Opportunities:

Support the CFAO in promoting understanding of the budget among staff members, including the accurate coding of expenses by those with budget authority. Support the CFAO in the review, and revision as appropriate, of processes and procedures relating to finance and administration.