



2025-2026 Development Plan

	June/July – September (Quarter 1)	October-December (Quarter 2)	January-March (Quarter 3)	April- June (Quarter 4)
<p>Major Gift (includes Planned Giving and Endowment) Through a well-executed major gifts program, CFL will engage donors and prospects capable of making gifts of \$10,000 and above to meet the financial goals of the organization. Well stewarded major donors become a natural pipeline for the endowment and planned giving programs. All gift officers should be proficient in their knowledge of the gift acceptance policy and be able to articulate the concepts of planned giving and gifts to support CFL's endowment when speaking with donors.</p> <p>Point Person – Major Gifts: DVP</p>	<ul style="list-style-type: none"> • From the approved budget identify the priority funding areas and targets for this fiscal year. <ul style="list-style-type: none"> ○ Unrestricted ○ Entrepreneurial Program ○ College and Career Prep ○ TSIC ○ Scholarships ○ Educator Programs ○ Teacher Grants ○ Golden Apple • Rebalance portfolios the Director of Development - Major Gifts, Chief Development Officer and President and CEO (DVP, CDO, CEO) <ul style="list-style-type: none"> ○ Review assigned prospects in RE ○ Identify and qualify unassigned donors in RE ○ Identify prospects from the Entrepreneurial Program Volunteers, Mentors, etc. in RE that have not yet made a gift. • Cultivation actions to connect with donors and prospects ahead of their return to Naples with the goal of a face-to-face meeting upon their return. (DVP) • Face-to-face cultivation and stewardship actions for full time donors and prospects in Naples with the goal of identifying readiness for a solicitation. (DVP) • Face-to-face identification calls on prospects to gauge interest and to introduce CFL's needs to build follow up actions to move prospect to an ask. (DVP) • Reassess DAF, IRA, Securities, and gift through estate plan buck slip 	<ul style="list-style-type: none"> • Luminary Circle Event – Date TBD November 2025. Donors who have made a gift of \$5,000 or more in the last fiscal year and donors who have made their planned giving intention known to CFL. (WB) <ul style="list-style-type: none"> ○ Location TBD ○ Time TBD • Meet the Students Experience • State of the Organization presentation • Impact Report distribution (RT, SF and WB to manage and complete mailing mid-November 2025) • Face-to-face solicitations for donors and prospects to close gifts by December 31, 2025. (DVP) • Face-to-face stewardship meetings in response to year end gifts. (DVP) • Night For Champions and Golden Apple Celebration sponsorship follow up to close commitments by December 31, 2025. (WB and DVP) • Utilize Raiser's Edge to track all actions, contact with donors and prospects, opportunities, and outcomes. • Confirm 2-3 commitments from key stakeholders to host parlor meetings in their communities during season. (CEO, DVP and WB) • Be proficient in communicating planned giving strategies in donor and prospects meetings and proposals. • Be proficient in communicating endowment giving strategies in donor and prospect meetings and proposals. • Include DAF, IRA, Securities and gift through estate plans in year-end communication plan. 	<ul style="list-style-type: none"> • Night For Champions – Date TBD 2026 (WB) <ul style="list-style-type: none"> ○ Location TBD ○ Time TBD ○ Timeline TBD • Face-to-face stewardship meetings in response to year end gifts. (DVP) • Face-to-face identification calls on new donors (\$5,000 or more) to CFL from Q1 and Q2 to gauge interest and to introduce CFL's needs. Portfolios will continue to be rebalanced as new donors are assigned. (DVP) • Utilize Raiser's Edge to track all actions, contact with donors and prospects, opportunities, and outcomes. • Night For Champions and Golden Apple Celebration sponsorship follow up to close commitments by date TBD 2026. (WB and DVP) <ul style="list-style-type: none"> ○ Complete stewardship actions for sponsors and donors to Fund-a-Need. • Host parlor meetings with key stakeholders in their communities. (CEO, DVP and WB) 	<ul style="list-style-type: none"> • Golden Apple Celebration – Date TBD April 2026 (WB) <ul style="list-style-type: none"> ○ Location TBD ○ Time TBD ○ Timeline TBD • Face-to-face stewardship meetings in response to Mid-Winter appeal. (DVP) • Face-to-face identification calls on new donors (\$5,000 or more) to CFL from Q3 to gauge interest and to introduce CFL's needs. Portfolios will continue to be rebalanced as new donors are assigned. (DVP) • Utilize Raiser's Edge to track all actions, contact with donors and prospects, opportunities, and outcomes. • Golden Apple Celebration sponsors follow up to close commitments by date TBD 2026. (WB and DVP) • Complete stewardship actions for sponsors and major donors as needed. (WB and DVP) • Host parlor meetings with key stakeholders in their communities. (CEO, DVP and WB)



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<p>Annual Giving and Digital Fundraising A well-executed annual giving program is essential to broaden support, upgrade levels of giving and provide operating support for CFL's programs. Through a variety of channels, we will expand our efforts to acquire new donors, renew previous donors, increase frequency and size of gifts from loyal donors, to create a pipeline for major and planned giving.</p> <p>Point Person - Annual Giving: RT</p> <p>Point Person – Digital Fundraising: SF</p>	<ul style="list-style-type: none"> From the approved budget identify the priority funding areas and targets for appeals this fiscal year. (RT with SV) <ul style="list-style-type: none"> Unrestricted Entrepreneurial Program College and Career Prep TSIC Scholarships Educator Programs Teacher Grants Golden Apple Appeal calendar developed with estimated dates included on when to pull lists, finalize lists/copy, upload to InTech, and post office drops. (RT) <ul style="list-style-type: none"> Late September/Early October 2025 – Digital only Fall Appeal November 2025 – Impact Report Appeal – mail/digital November/December 2025 Year End Appeal – mail/digital February/March 2026 Mid-Winter Appeal – mail/digital May/June 2026 – Digital Only Fiscal Year End Appeal. Direct mail items designed by Elephant Creative (appeal letter shells, remit, #9 remit envelope, #10 envelope) (RT) Impact Report 2025 in development with Elephant Creative, writing content and pulling photos (RT, SF) Reassess Ways to Give buck slip and update if necessary, and develop event save the date buck slips for NFC and GA to be used throughout the year in acknowledgment letter mailings, appeal mailings and on-line. (SF, RT) Reassess current donor stewardship program and update if necessary to ensure engagement of major gift team, student and educator program staff and students, Alumni Council and Board members. (DVP) 	<ul style="list-style-type: none"> Late September/Early October 2025 digital appeal (SF RT) <ul style="list-style-type: none"> Segments <ul style="list-style-type: none"> CY25 current donors CY24 donors but not CY25 SYBUNTS (last gift was in CY21) November 2025: Impact Report Appeal – messaging and theme TBD, to print on October 23, 2025. Segments <ul style="list-style-type: none"> Luminary Circle Luncheon invitees Donors (cumulative \$500+, 2021 to date) <ul style="list-style-type: none"> New Donors (from FY25 to date) Volunteers (email only) <ul style="list-style-type: none"> Current TSIC Mentors Current Entrepreneurship Volunteers Current Committee Members November/December 2025: Year End Appeal – message similar to Impact Report Mailing <ul style="list-style-type: none"> Segments <ul style="list-style-type: none"> CY25 Donors not in IR mailing CY24 but not CY25 Donors not in IR mailing (LYBUNTS) Donors Between 1/1/2020-12/31/2023 not in IR mailing <ul style="list-style-type: none"> Purchase lists with InTech? Implement and monitor new donor communication plan effectiveness. Adjust as necessary. (RT, SF) Surprise Classroom Grant Delivery Day- (SF) <ul style="list-style-type: none"> Early October – Digital and marketing <ul style="list-style-type: none"> Determine Press Route with Educator Programs team Coordinate photography/videography for day of 	<ul style="list-style-type: none"> February/March 2026: Mid-Winter Appeal - Copy TBD (RT SF) <ul style="list-style-type: none"> Segments – exact segments finalized later (TBD) Donors on IR mailing without gift Donors on YE mailing without gift NFC? Monitor and evaluate new donor communication plan. Adjust as necessary. (RT, SF ongoing) Golden Apple Prize Patrol Day – Date TBD – digital and marketing (SF) <ul style="list-style-type: none"> Communication with media Photographer needed Videographer needed Social media (day of) Press Release Announcing GA Recipients Post all photos to Facebook Update website with new photos Ad in NDN Video recap for social media Success Stories – Rolling Process - digital and marketing (SF, RT ongoing) <ul style="list-style-type: none"> Students in the Lab – Career Exploration, FAFSA Labs Current Students Alumni/College Students – where are they now Incorporate Classroom Grant Success Stories GA success stories Components: Same as Q1 and Q2 Digital Marketing Event Support (SF, RT, with WB) <ul style="list-style-type: none"> NFC Pre-Event <ul style="list-style-type: none"> Invite – Email Blast Social Media Posts for tickets / Boosted posts as needed Naples Daily New and Naples Illustrated ads 	<ul style="list-style-type: none"> Late May/Early June digital appeal. Story on soon to be graduating CCP/TSIC senior and next stage of their journey or mini stories on several seniors with graphics depicting overall class stats. (SF, RT) Monitor and evaluate new donor communication plan. Adjust as necessary. (SF, RT ongoing) Success Stories – digital and marketing (SF, RT ongoing) <ul style="list-style-type: none"> Graduating Seniors – highlighting accomplishments of our graduating class including college acceptances, scholarships, etc. Alumni/College Students – where are they now Classroom grant success stories GA success stories Components: Same as previous quarters Digital Marketing for Events (SF, RT, with WB) <ul style="list-style-type: none"> GA Pre-Event <ul style="list-style-type: none"> Digital invite email blast Social media posts for tickets Social media countdown of all TODs & their high impact practices leading up to event Naples Daily News and Naples Illustrated ad GA Post-Event <ul style="list-style-type: none"> Post event press release Segmented post event email Social media post / Website post with press release Post event photos to Facebook gallery Update website photo gallery
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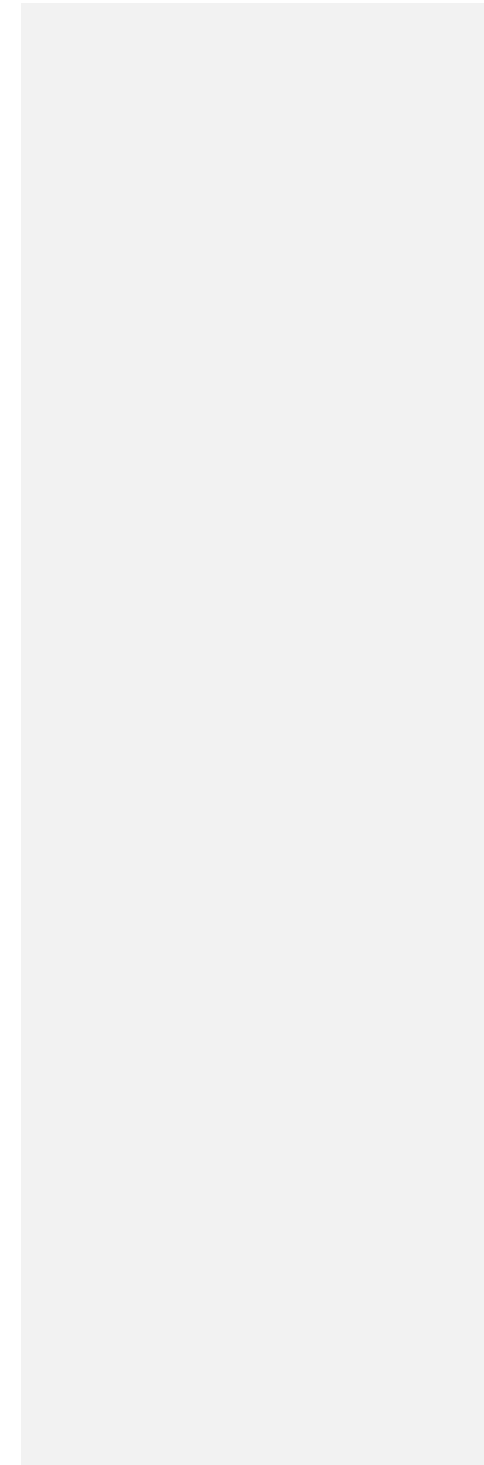
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	<p>for on-going Alumni Council meetings and activities.)</p> <ul style="list-style-type: none"> • Maintain monthly stewardship program – first time donors and \$5,000+ donors receiving handwritten thank you note from CFL Board Chair or emailed version, depending on the method of their gift. (RT, SF) • Research and develop new donor communication plan with scheduled touch points that focus on engagement leading up to the next ask. (RT, SF, DVP) • Classroom Grants Fundraising – Digital (SF) <ul style="list-style-type: none"> ○ Find It Fund It Portal Opens to Donors Date TBD – Mid-July ○ Meet with new FindItFundIt manager to understand updates to the platform and its capabilities ○ Primary Audience: Those who have given to Classroom Grants in the past, and the general public who wants to support educators ○ Targeted email blast segmented by previous donors and non-donors ○ Naples Daily News Ads ○ Social Media posts & Targeted ads ○ Website Popup ○ Google Ad Campaign • Student Stories – Digital and Marketing (SF and RT on-going) <ul style="list-style-type: none"> ○ Current Students & Their Summer Plans ○ College Campus Field Trips ○ College students from Class of 2024, where are they now ○ Launch Alumni Council with mini-stories on members ○ Various Alum/College students ○ Components of Success Stories: <ul style="list-style-type: none"> ▪ Blog Post with CTA that links to form ▪ Social Media Posts 	<ul style="list-style-type: none"> ○ Media advisory prior to delivery day ○ Communication with local media – Gulf Coast News, Naples Daily News, CCPS Media ○ Social media posts (day of) ○ <u>Identify potential classrooms for success stories</u> ○ Press release following delivery day ○ Post all photos to Facebook ○ Update website with new photos ○ Full-page ad in NDN ○ Recap video for social media • Teachers Of Distinction Kick Off– October Date TBD, 2025 (WB, SF) <ul style="list-style-type: none"> ○ Assist Educator program staff with photography if needed ○ Press Release and updating website ○ Posting to social media • Student Stories – Rolling Process (RT, SF) <ul style="list-style-type: none"> ○ Students in the Lab – Career Explorations, Networking Labs, Resume Building Labs ○ Current Students ○ Alumni/College Students – Where are they now ○ Components: Same as Q1 • Digital Marketing for events (SF) <ul style="list-style-type: none"> ○ NFC/GA Save the Date <ul style="list-style-type: none"> ▪ Email blast ▪ Social media post ▪ Naples Daily News ad 	<ul style="list-style-type: none"> ○ NFC Post-Event <ul style="list-style-type: none"> ▪ Press release announcing total raised ▪ Follow up email segmented by those who attended / those who didn't attend ▪ Post on website ▪ Post photos to Facebook gallery ▪ Post event video to YouTube / Social media channels ▪ Update Event page photo gallery ▪ Submit photos to publications ▪ Post event recap ads in Naples Daily News / Naples Illustrated 	<ul style="list-style-type: none"> ▪ Post event video to YouTube / social media / website ▪ Submit event photos to publications ▪ Post event ads in Naples Daily News / Naples Illustrated
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	<ul style="list-style-type: none"> ▪ Naples Daily News Ads with QR Code • General Digital Fundraising Website Content (SF on-going) <ul style="list-style-type: none"> ○ General SEO Keyword focus blog posts ○ Ideas: How To Support Educators in Collier County ○ How To Support Students in Collier County ○ How to Donate to Teachers ○ How to Donate to Students ○ Create Fundraising Focused-Landing Pages For Various Programs • Utilize Raiser's Edge Optimized Form Widgets for online giving (SF) 			
<p>Special Events – Designed to raise funds and cultivate relationships with donors and prospects, Special Events are an important part of CFL's overall fundraising strategies. Because special events tend to be the most costly form of fundraising, careful management of revenue and expenses is required to elevate the effectiveness of our events. Special events for the organization will also include cultivation and stewardship events but any event designed for the purpose of</p>	<ul style="list-style-type: none"> • Convene 2026 Night for Champions planning committee members, identify and engage co-chair(s) (WB on-going) • Develop and launch plan for Night for Champions and Golden Apple Celebration sponsor slicks. The first round of solicitations complete by TBD. (WB) • Participate in face-to-face sponsor stewardship and solicitations with CEO and Chief Development Officer (WB) • Develop and launch plan for Save-the-Date for Night for Champions and Golden Apple Celebration. Include email and mailed version. (WB, SF) • Develop and launch invitation mailing for Luminary Circle Luncheon. (Initial mailing and digital push for round one invitees September, 2nd round mailed invitations to drop early 3rd week of October. (WB, DVP) • Develop a timeline for Luminary Circle event, Night for Champions and Golden Apple Celebration tasks with date tracking, resources needed, and staff assigned. (On- 	<ul style="list-style-type: none"> • Luminary Circle Event – November Date TBD, 2025 Donors who have made a gift of \$5000 or more in the last fiscal year and donors who have made their planned giving intention known to CFL. (WB) <ul style="list-style-type: none"> ○ Location TBD ○ Time TBD ○ Meet the Students Experience ○ State of the Organization presentation ○ Impact Report distribution • Board Dinner – December Date TBD, 2025 – Location TBD (staff attendees TBD) • Monitor and follow up on sponsor solicitations with Events and Development Team for Night for Champions and Golden Apple (WB, RT, DVP) • Manage and complete planning details for Night for Champions event February Date TBD, 2026, as outlined on planning timeline. (WB) • Plan and host Teacher of Distinction kick-off event with Educator Program staff (WB) 	<ul style="list-style-type: none"> • Night for Champions – Date TBD, 2026 (WB) <ul style="list-style-type: none"> ○ Location TBD ○ Time TBD ○ Timeline TBD • Provide planning and implementation support to Educator Program staff for Golden Apple prize patrol (SF) 	<ul style="list-style-type: none"> • Golden Apple Celebration – Date TBD, 2026 (WB) <ul style="list-style-type: none"> ○ Location TBD ○ Time TBD ○ Timeline TBD • Volunteer Appreciation Week event(s) – Date TBD/Player's Club (WB) • Induction – May Date TBD, 2026, Location TBD (WB) • Countdown to Cap and Gown – Saturday, May Date TBD, 2026, location TBD. (WB) • Strategize Night for Champions planning committee membership (WB, CEO)

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<p>fundraising will have a minimum ROI of \$100,000.</p> <p>Point Person – Special Events: WB</p>	<p style="color: red;">going depending upon event. WB will need to monitor and report)</p> <ul style="list-style-type: none"> Manage and complete planning details for Luminary Circle event, November Date TBD, 2025. (WB, CEO) Determine date and secure locations for Volunteer appreciation event, Induction and Cap and Gown. (WB) 	<ul style="list-style-type: none"> Utilize the Event module in Raiser's Edge to track responses, expenses, create follow up action lists, etc. for Night for Champions. (MP, WB, SF) Develop plan for night of event check in, check out and processing of Fund-a-Need payments. (SF, MP, WB, SV) <ul style="list-style-type: none"> Research software options, may decide to reuse GiveSmart / Ace at the event (SF, MP, WB, SV) 		
<p>Grants – As an existing strategy for revenue, we will continue to enhance and expand our efforts to secure private and public grant support.</p> <p>Point Person: RT</p>	<ul style="list-style-type: none"> Finalize Program Outlines and create a budget template with CFO. (RT ongoing) Create grants master plan (RT) Create written grants management process. (RT) Identify new grant funding opportunities. (RT ongoing) Manage timeline, reporting requirements and follow up reporting for existing grants. (RT ongoing) Face-to-face cultivation and stewardship meetings with current and prospective funders. (RT ongoing) 	<ul style="list-style-type: none"> Identify new grant funding opportunities. (RT ongoing) Manage timeline, reporting requirements and follow up reporting for existing grants. (RT ongoing) Face-to-face cultivation and stewardship meetings with current and prospective funders. (RT ongoing) 	<ul style="list-style-type: none"> Identify new grant funding opportunities. (RT ongoing) Manage timeline, reporting requirements and follow up reporting for existing grants. (RT ongoing) Face-to-face cultivation and stewardship meetings with current and prospective funders. (RT ongoing) 	<ul style="list-style-type: none"> Identify new grant funding opportunities. (RT ongoing) Manage timeline, reporting requirements and follow up reporting for existing grants. (RT ongoing) Face-to-face cultivation and stewardship meetings with current and prospective funders. (RT ongoing)
<p>Development Operations – To achieve the goals of the organization attention must be paid to the accuracy of our donor data, our ability to utilize data effectively, our establishment and adherence to policies and procedures and our ability to incorporate best</p>	<ul style="list-style-type: none"> Create and monitor workflows in RE for stewardship and new donor communication plan. (SF and RT ongoing with MP) Support Special events, and annual and digital fundraising efforts by creating invitation, eblast and appeal mailing lists. (MP ongoing) Create appeals and import final mailing lists to accurately capture communications with donors and prospects. (MP ongoing) 	<ul style="list-style-type: none"> Monitor data in Raiser's Edge and address any issues with appropriate user groups. (MP ongoing) Utilize prospect research tools to capture additional biographical information about donors and prospects for the Major Gift team. (MP, DVP ongoing) Support Special events, and annual and digital fundraising efforts by creating invitation, eblast and appeal mailing lists. (MP ongoing) Create appeals and events in RE so that final mailing lists can be imported to 	<ul style="list-style-type: none"> Monitor data, launch duplicate record clean up, address updates, etc. in Raiser's Edge. (MP ongoing) Utilize prospect research tools to capture additional biographical information about donors and prospects for the Major Gift team. (MP, DVP ongoing) Support Special events, and annual and digital fundraising efforts by creating invitation, eblast and appeal mailing lists. (MP ongoing) Create appeals and events in RE so that final mailing lists can be imported to 	<ul style="list-style-type: none"> Monitor data, launch duplicate record clean up, address updates, etc. in Raiser's Edge. (MP ongoing) Utilize prospect research tools to capture additional biographical information about donors and prospects for the Major Gift team. (MP, DVP ongoing) Support Special events, and annual and digital fundraising efforts by creating invitation, eblast and appeal mailing lists. (MP ongoing) Create appeals and events in RE so that final mailing lists can be imported to

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<p>practices in our work.</p> <p>Point Person – Operations: SF</p> <p>Point Person – Database: MP</p>		<p>accurately capture communications with donors and prospects <i>(MP ongoing)</i></p> <ul style="list-style-type: none"> • Implement process for accurately capturing event RSVPs and expenses so that information is accessible to the team. <i>(MP, WB ongoing)</i> 	<p>accurately capture communications with donors and prospects <i>(MP ongoing)</i></p> <ul style="list-style-type: none"> • Accurately capturing event RSVPs and expenses so that information is accessible to the team. <i>(MP, WB ongoing)</i> 	<p>accurately capture communications with donors and prospects <i>(MP ongoing)</i></p> <ul style="list-style-type: none"> • Accurately capturing event RSVPs and expenses so that information is accessible to the team. <i>(MP, WB ongoing)</i>
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