



**To:** EN Members, Board of Directors  
**From:** EN Eric Williams, Ed.D., CEO & President  
**Date:** 10/01/2025  
**Subject:** Confidential Board Update

Notes

1. The discussion at last week's Board meeting regarding the strategic roadmap was helpful. It makes sense to consider fiscal year metrics and the implications for the length of the roadmap and the start of the multi-year strategic plan. It will also be helpful to have an initial discussion regarding the multi-year strategic planning process at the November Board meeting. I will work with Stephanie Lucarelli, who is chairing the Strategic Planning Committee, to convene a meeting of this committee to give me feedback on a draft strategic roadmap before the November Board meeting.
2. With Stephanie Viviano concluding her service fulfilling CFO responsibilities on a contractor basis at the end of 2025, we are preparing to post a reconfigured chief position. Compared to the previous CFO description, this role places less emphasis on investment strategy, capital raising, and complex financial forecasting. However, it continues to carry CFO-level responsibilities such as endowment and investment oversight in accordance with board policies, leadership team participation, multi-year financial planning, and donor-facing financial communication. At the same time, the position incorporates comptroller-like duties in financial reporting, internal controls, and audit preparation, while expanding into broader administrative and data leadership. Together, these responsibilities justify a chief-level role that combines financial stewardship, organizational operations, and strategic leadership. The draft job description is attached. We plan to post this position as early as next Wednesday.
3. We learned this week that one of the teachers selected as a tentative Teacher of Distinction is a Take Stock in Children alumnus! Stay tuned for details.
4. I continued meetings with various stakeholders in September, including the following: lunch with the Leslie Ricciardelli and the FGCU President; meeting with Entrepreneurship Program volunteers and teachers; Florida Consortium of Education Foundations' ConnectEd Conference; Breakfast of Champions event hosted by the Collaboratory; Maria Jiminez-Lara, Naples Children and Education Foundation; Grace Place for Children and Families – tour and meeting with CEO and Chief Program Officer; Jackie Rodriguez, Suncoast Federal Credit Union;

Leadership Collier Class of '26 Kickoff Event; a second meeting/training with entrepreneurship volunteers; and Jeff Kunberger (Suncoast Foundations Executive Director) and Bob Hyde, VP, Community Impact, Suncoast Credit Union.

### Emails and Other Documents

1. *Draft Job Description - Chief Financial & Administrative Officer*; October 1, 2025; pps. 3-6.
2. *Community Engagement & Volunteers*; email from Anne Stavelly; September 25, 2025; p.7
3. *Development Team Update*; email from Rebekah Telfer; September 29, 2025; pps.8-9
4. *Educator Programs*; email from Marilyn Daniels; August 18, 2025; p.10
5. *Student Programs*; email from Kristin Carolan; August 28, 2025; p.11
6. *News + Notes: Connecting Families + Community with CCP5*; September 26, 2025; pps.12-15

### Communication

1. 9/17 and 9/24 – Naples Daily News Ad – Classroom Grants Half Page. p.16

### Key Dates

1. Orientation for New BOD Members (all members welcome) – October 9, 9 a.m. to 11 a.m., CFL Office
2. Teachers of Distinction Kickoff Reception – October 20, 2025, 6 p.m. to 8 p.m.; The Naples Grande
3. Finance Committee Meeting – November 5, 2025, 2 p.m.
4. Executive Committee Meeting – November 11, 2025; 3:30 p.m.
5. Board of Directors Meeting – November 18, 2025, 3:30 p.m.
6. Night for Champions Gala – February 21, 2026, 6 p.m. to 11 p.m.; The Ritz-Carlton, Naples Luminary Circle Luncheon – Thursday, November 20th, 2025, 11am; Ritz-Carlton Beach Resort
7. Night for Champions Gala – February 21, 2026, 6 p.m. to 11 p.m.; The Ritz-Carlton, Naples



## JOB DESCRIPTION

**Job Title:** Chief Financial & Administrative Officer

**Department:** Finance & Administration

**Reports to:** Chief Executive Officer

**Effective Date:** 01/01/2026

**FLSA Classification:** Exempt

**Compensation Tier:** Tier 2

**Salary Range:** \$100,000 - \$180,000 (FY26)

**Remote/In-Person Status:** in-person with some remote flexibility

\*Exceptions to the salary range may be made for employees with special skills and talents.

### **Job Summary:**

This position is responsible for leading the financial operations of the organization as a member of the executive leadership team. The Chief ensures accurate financial reporting, strong internal controls, effective risk management, and vendor accountability, supporting the organization's operational efficiency and compliance with regulatory requirements. This role oversees key administrative functions, including outsourced human resources, information technology, facilities management. This position supports the organization's culture of philanthropy, producing clear, donor-friendly reporting that builds trust, transparency, and engagement.

### **Supervisory Responsibilities:**

Supervises the Manager of Finance & Administration and aspects of the Database Operations Manager's work in collaboration with the Chief Executive Officer and the Chief Development Officer. Supervises external contractors in the areas of human resources and information technology.

### **Duties/Responsibilities:**

#### Financial Management, Reporting and Planning

- Directs the preparation of all financial statements, including income statements, balance sheets, tax returns, and governmental agency reports



## JOB DESCRIPTION

- Manages organization funds, including access to bank and investment accounts, authorization of disbursements, and oversight of cash handling procedures
- Oversees treasury functions, including cash flow management, banking relationships, check signing, wire transfers, and safeguarding of petty cash, ensuring appropriate internal controls are maintained
- Produces timely Board Updates, monthly financial reports, and quarterly financial reports, including cash flow, budgeted versus actual analysis with adjustments as needed, and program expense reporting
- Formats financial documents so they are clear and donor-friendly, providing transparency to board members, staff, and donors.
- Works with program staff to manage scholarship assets, project future needs and make timely purchases
- Manages organizational funds by maintaining access to bank and investment accounts, authorizing disbursements, overseeing cash handling and banking relationships, and ensuring appropriate reserves and internal controls are in place in line with board-approved policies and best practices
- Maintains integrity of data in accounting and donor record systems

### Budgeting & Compliance

- Works with the CEO, Finance Committee, and staff to develop the annual budget, prepare two additional years of projected budgets, and provide appropriate reports for program outcomes
- Oversees internal controls, separation of duties, and financial operating procedures
- Ensures compliance with the law and organizational policies
- Supports the grant writing and reporting processes as it relates to budgets

### Audit, Committees, and Board Support

- Works with audit firm to prepare the financials for annual audit and tax reporting, and reviews financial operating procedures to ensure alignment with staff roles and proper separation of duties
- Serves as staff liaison for Board finance-related committees
- Provides financial analysis and input to support organizational strategic planning
- Communicates financial information in ways that reinforce donor confidence and support the organization's culture of philanthropy
- Prepares financial reports for the Board and attends Board meetings as needed
- Works with the CEO and Board finance-related committees to draft and review policies annually

### Administration & Vendor Oversight



## JOB DESCRIPTION

- Manages outsourced Human Resource, Information Technology, and facilities management services by serving as the primary staff contact with vendors, ensuring contract compliance, performance accountability and effective service delivery
- Oversees organizational insurance policies, including renewals and claims management, and conducts RFP processes for insurance and other financial services as directed
- Conducts periodic vendor reviews, including for outsourced services and recommends contract adjustments to the CEO
- Manages the organization's endowment and other invested funds as the primary staff contact with investment managers, ensuring compliance with board-approved investment practices and policies and providing timely reports to the applicable Board committee(s)
- Ensures administrative policies and procedures in these areas remain compliant with applicable laws and organizational standards

### Data Leadership & Organizational Learning

- Provides leadership in the use of data across the organization, promoting consistent practices for data collection, management, and reporting
  - Works with program and development staff to ensure that financial, program, and donor data are aligned to support transparency, decision-making, and stewardship
  - Oversees data integrity in core systems (accounting, donor database, scholarship management) to ensure reliable information for staff, board, and donors
- 
- Performs other related duties as assigned

### **Competencies:**

- Financial Management and reporting for non-profits
- Job Knowledge
- Communication
- Teamwork & Cooperation
- Professionalism
- Mission Alignment
- Organizational Relations
- Commitment to donor-centric communication and transparency
- Support for a culture of philanthropy



## JOB DESCRIPTION

### **Core Values:**

- Trust
- Love
- Collaboration

### **Required Skills/Abilities:**

- Strong knowledge of business (accounting degree and experience in not for profit preferred)
- Ability to direct the activities of others in a successful and efficient manner.
- Proficient in MS word, Excel, Power Point, and Financial Edge
- Excellent analytical and organizational skills
- Proficient in database and accounting computer application systems
- Excellent written and verbal communication skills with ability to translate complex financial information into clear, donor-friendly language
- Ability to collaborate with colleagues to support program delivery, fundraising and stewardship

### **Education and Experience:**

- Bachelor's degree in Accounting, Finance or Business Administration required.
- Certified Public Accountant designation preferred.
- Seven to ten years of experience in financial management required.
- Nonprofit experience preferred.

### **Physical Requirements:**

- Prolonged periods of sitting at a desk and working on a computer.
- Must have the flexibility to work evenings and weekends as required by the position.
- Must be able to lift up to 25 pounds at times.

## Eric Williams

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**From:** Anne Stavelly  
**Sent:** Thursday, September 25, 2025 1:29 PM  
**To:** Eric Williams  
**Subject:** Community Engagement & Volunteers Board Update

### Take Stock in Children:

- Nicole is collaborating with Student Programs and Kimberly Dickerson, CCPS School Counseling Coordinator, to develop and host the October 23 Mentor Learning Session.
- I have secured presenters for the October 1 Career Exploration Night (Engineering & Vocational). Participants include engineers from community partners, Arthrex and B&I Contractors as well as CCPS Lorenzo Walker instructors.
- Nicole is working with Dottie Whipple and Tammi Pittaro to plan and execute a mentor Coffee and Conversation program on Wednesday, October 8.

### Entrepreneurship:

- Nicole is completing mentor and school rosters to ensure effective teacher and student support.
- Champions cohosted a professional development day for CCPS Entrepreneurship teachers and mentors. Nicole presented along with Ysela Quintana, Manager, Career & Technical Education.
- Nicole met with Ruben Perales, Assistant VP, 5/3 Bank who has agreed to become a mentor and to recruit fellow employees.
- Champions and CCPS will host an Entrepreneurship Mentor Orientation on September 30. Presenters include Bob Henry, Ysela Quintana, and Nicole.

### Educator Programs:

- Ongoing recruitment for committees. Nicole continues to update databases to maintain active engagement and reporting accuracy.
- Successful recording of the Grants training was completed by Nicole and Marilyn.

### General:

- Eric and I had an introductory meeting with Lära Fisher, CEO and Marcie Curry, Chief Program Officer at Grace Place for Children and Families.
- I have secured meetings with Kim Wallace, Senior Director of Alumni Relations, FGCU and Teresa Stohs, President, LWVCC to discuss potential collaboration focused on TSIC mentor recruitment.
- I am working on monthly volunteer emails (program specific) and a quarterly volunteer newsletter. Monthly emails will begin October 3 and will be sent the first Friday of each month.

Thank you,  
Anne

## Eric Williams

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**From:** Rebekah Telfer  
**Sent:** Monday, September 29, 2025 1:38 PM  
**To:** Eric Williams  
**Cc:** Sydney Fahrenbruch; Mary Polli; Wyatt Blatt; Danielle Viens-Payne  
**Subject:** Development Team Update

Below are the Development Team's updates from our last report to you.

### **Events (Wyatt Blatt, Director of Special Events)**

- Luminary Circle Luncheon
  - Invitation Mailing: The invites were mailed out last week and we have begun receiving RSVPs.
- Night for Champions Gala
  - Invitation Mailing: The team is working on the design with Elephant Creative and will be completed by Early December to be mailed out in the first week of January 2026.
  - Save the Date Mailing: The Save the Date postcards were mailed out and hit mailboxes last week

### **Digital Fundraising and Marketing/Communication (Sydney Fahrenbruch, Director of Digital Fundraising & Operations)**

- I have been working with Wyatt on digitally distributing the Save The Date for Night For Champions in conjunction with the mailing dropping. We sent an email blast and posted on social media announcement on Wednesday 9/24, and made the link to purchase tickets live on our website.
- Last week we submitted our listing for the Gulfshore Business Giving Guide, a yearly publication designed to inform and connect businesses with nonprofit organizations that are aligned with what they care about. Our one-page listing features details on our programs, events, and volunteer opportunities.

### **Annual Giving and Grants (Rebekah Telfer)**

- Grants Awarded for FY26
  - Regions Bank – awarded \$2,500 to provide a Classroom Grant to Immokalee Technical College for their Early Childhood Education Program
- Grants Submitted for FY26
  - Jingled Elves – applied for \$15,000 to support the Take Stock in Children Program
  - BMO – applied for \$15,000 (for a \$10,000 Night for Champions event sponsorship and a \$5,000 Golden Apple Celebration of Teachers event sponsorship)
- Grant Reports from FY25 Submitted in September
  - Regions Bank
  - Arthrex, Inc.
  - Edward T. Bedford Foundation
- October Grants in Progress
  - Fischer Family Foundation – due 10/31/2025
- Impact Report 2025
  - Submitted second round edits on the proof on 9/26/25. Internal staff have reviewed the core program spreads to verify information and metrics are

correct. When sent by the designer, the third round of edits will be handled by a group of staff for line-by-line copy edits.

- The loose solicitation letters have been written and sent to the designer to create
- Fall Appeal 2025 (email only)
  - Content has been written and will focus on our work with educators, highlighting Gina Manville DeJager as a past Golden Apple honoree and a recipient of multiple Classroom Grants
  - Goal is to send the emails by mid-October to several donor segments, including donors who have given to specifically Educator Programs, donors who have given to unrestricted, and donors who have given to other funds
- Endowment Reports 2025
  - I worked with Danielle to send out FY25 reports to each of our endowment fund holders. Included with each report will be a brief cover letter.
- Other
  - I will be attending the annual NCEF Beneficiary meeting on 10/3/25 – this meeting will go over grant reporting requirements and introduce the 2026 Meet the Kids Day theme

#### **Major Gifts (Danielle Viens-Payne)**

- Note: Danielle is currently on PTO
- Working with Mary to implement new wealth screening/donor prospect software
- Working with Sydney on CFL marketing collateral
- Next Alumni Council meeting October 16
- Alumni Council working on planning a December alumni social
- Exploring potential hosts for 2-3 parlor meetings in the Spring
- Continuously personalizing major gift stewardship plans for each donor
- Cultivating prospective end of year gifts (Q1 and Q2) and setting up donor calls (individuals/family foundations, corporate)

#### **Development Operations (Mary Poll)**

- Working with Danielle to implement new wealth screening/donor prospect software
- Pulled mailing lists for the Fall Appeal emails

## Eric Williams

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**From:** Marilyn Daniels  
**Sent:** Friday, September 26, 2025 2:17 PM  
**To:** Eric Williams  
**Subject:** Educator Programs - Board Updates 9.29.25

Here are this week's Educator Program updates.

### **Classroom Grants Cycle Overview (2025-2026)**

We are incredibly grateful to our Classroom Grant Volunteer Committee, which has doubled in size this year! Volunteers are working in small groups and scoring approximately 25 grants independently. Thank you to Wyatt for helping with the grant export! Each group has a volunteer lead, an experienced volunteer with Champions For Learning and experience in scoring classroom grants. Leads have been an invaluable resource and support for each team, and for our Champions staff. Since the Find It Fund It Portal opened for this school year, we've received nearly 400 grant requests, totaling just over \$325,000. Committee score submissions are to be received by CFL on October 8<sup>th</sup>. We have also confirmed our Prize Patrol Delivery date with CCPS and are excited to celebrate grant recipients!

### **Golden Apple Teacher Recognition Program (2025-2026)**

*Thank-A-Teacher* nominations are complete, and we received over 5,700 submissions for 1,486 educators! Huge shout out to Mary Polli and Natalie Harding for their help entering *Thank-A-Teacher* nominations!! Golden Apple will continue the focus on celebrating and highlighting educator's best practices. Each school's top nominee was shared with principals for approval this week. Notifications will be shared with teachers September 29<sup>th</sup>, followed by a virtual session on October 6<sup>th</sup> to share the program overview. Afterward, teachers will have the opportunity to confirm or decline their participation. Eric, Wyatt, Sydney, and Marilyn are in the midst of planning the recognition event in April, as well as the Teacher of Distinction Kickoff Event on October 20<sup>th</sup>!

### **We continue to collaborate with our CFL staff and CCPS on next steps:**

- *Thank-A-Teacher* nomination results → communication with principals → communication with Tentative TODs and Virtual Session/Program Overview
- TOD Kickoff planning with Wyatt
- Golden Apple Committee planning with Anne and Nicole
- FPL STEM Grant – providing PL to new teachers in science K-8, planning with Becky Tefler and K-12 science team at CCPS

We appreciate our stakeholders' continued support of Educator Programs!

### **Educator Programs**

Office: 239.643.4755

[EducatorPrograms@championsforlearning.org](mailto:EducatorPrograms@championsforlearning.org)

**ChampionsForLearning.org**

## Eric Williams

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**From:** Kristin Carolan  
**Sent:** Friday, September 26, 2025 11:13 AM  
**To:** Eric Williams  
**Subject:** Student Programs Board Update

### Student Programs:

College Night was the 15th at Golden Gate High School; we had a table to discuss our programs, and 50 of our students attended, as well as two mentors. Our 10th graders attended “How to Have a Successful Year” workshop on the 15th and 16th and our 11th and 12th graders’ workshop was titled “Creating a Positive Mindset.” This workshop was held over zoom to accommodate both grades attending at the same time. On the 22nd, Tracy Jones presented FASFA and Financial Aide info at the Secondary District Title One Virtual Parent Institute. Our 9th graders had their first workshop for the year on Goal Setting. We had a few mentors attend with their students. September 24th and 25th, 12th grade students and parents attended the Summer ‘26 FASFA Completion lab. 70 % of our 12th graders turned out. This is an amazing start because some students will not attend the summer semester and will wait till Fall. On September 26th, Tracy Jones and Eliza Torres attended Florida Gulf Coast University’s Community Partner Day. They were able to share about our programing and partnership with the University. We will be having a Day of Service on October 2nd at the Botanical Gardens. This is open to all students and mentors. It is an optional activity for students. CFL student one-on-one coaching sessions are going on for the first quarter.

The new Take Stock in Children Mentoring app rolled out at the beginning of the month. Take Stock is holding weekly virtual trainings for students and mentors to help them navigate the app. At the end of the training, Take Stock is accepting feedback on the new app as they continue working with the developers on improvements. CFL is also proactively seeking mentor feedback on the app moving forward so that we can share it with TSIC. Champions will still hold the extra mentor Zoom session on Wednesdays to ensure our mentors have ample time to hold their mentor sessions. We have had one mentor resign due to medical issues this month and one Take Stock student has left the program to relocate overseas.



Kristin Carolan

**Eric Williams**

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**From:** Collier County Public Schools <do-not-reply@collierschools.com>  
**Sent:** Friday, September 26, 2025 6:00 PM  
**To:** Eric Williams  
**Subject:** News + Notes September 2025

CAUTION: This email originated from outside of the organization. Do not click links or open attachments unless you recognize the sender and know the content is safe.

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The banner features the CCPS logo (an open book with a flame) on the left. To its right, the text "CCPS | NEWSLETTER" is displayed in a white, sans-serif font. Below this, a large black banner contains the text "NEWS + NOTES" in a large, white, sans-serif font. Underneath "NEWS + NOTES" is the tagline "Connecting Families + Community with CCPS" in a smaller, white, sans-serif font. On the left side of the black banner, there is a circular icon containing the CCPS logo. In the bottom left corner of the banner, the text "September 2025" is written in a white, sans-serif font.



**A NOTE FROM**

*Dr. Leslie C. Ricciardelli*

**Superintendent of Schools**

September is School Attendance Awareness Month. Thanks to our families, students, and staff, CCPS currently leads Florida with the lowest percentage of chronically absent students! Missing 2 days a month (18 days a year) means a student misses 10% of the school year. The mantra for CCPS for many years has been *On Time, All Day, Every Day*, and we understand extenuating circumstances,

including illness, may cause a student to miss school. At the September Board Meeting, we heard parents often have questions about absences and wanted more information. [School Board Policy 5200](#) provides you with all things pertaining to absences from school.

September 22 may have marked the first day of fall, but we are still in the middle of hurricane season. I want to make sure our community knows how our district prepares for and communicates about severe weather. Our goal is simple: to keep you informed with clear, timely, and trusted updates that prioritize safety and minimize disruption. [Click here to learn more.](#)

Periodically, Florida's Commissioner of Education Anastasios Kamoutsas shares information with our district's stakeholders on a variety of topics. We have made these memorandums available on our district website in the [CCPS Newsroom](#) and on this newsletter via the Florida Department of Education button in the next section. We will upload any new memorandums as they become available.

We are just ending our 7th week of school for the 2025-2026 school year, and I am encouraged by what I have been seeing in classrooms, on campuses, and at extra-curricular events. Thank you for reading this newsletter all the way through. By staying connected with Collier County Public Schools, you embody the Power of WE!

~ Dr. Leslie C. Ricciardelli

## UPCOMING DATES TO NOTE

### September 23

No School for Students (Teacher Professional Learning Day)

### October 2

No School for Students and Teachers

### October 8

Regular School Board Meeting at 9:00am

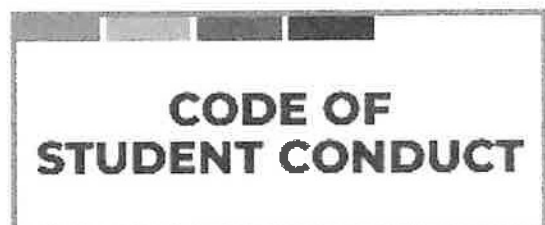
### October 13

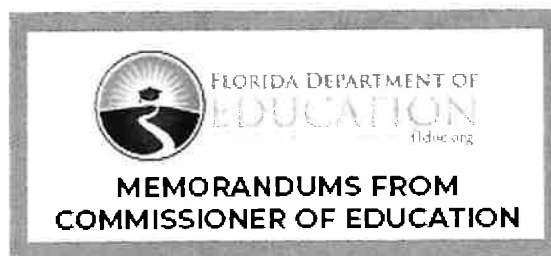
No School for Students (Teacher Planning Day)

### October 15

School Board Work Session (Legislative) at 4:30pm

### October 31





## A NOTE FROM THE SCHOOL BOARD

### Ms. Kelly Mason, Chair

I ran into one of our CCPS high school basketball coaches at the grocery store the other day. We had never met before, but we were talking about athletics, and he spoke a lot about using sports to prepare these young athletes to become better men in all aspects of life. I was so impressed by not only his commitment to our students but how seriously he took his role as their coach and mentor. It was obvious in a five-minute conversation how passionate he was about his job, his team, and his pride to work in Collier County Public Schools.

Youth sports has changed a lot since I was a young girl growing up in Indiana. After playing multiple sports during my childhood, I became a coach in various sports for young women. Through my experience participating in athletics and coaching, I have seen the good, the bad, and the ugly. As a school board member, I think it is critical for our district to set high standards and expectations for student athletes and coaches and ensure we uphold those standards in everything we do.

Sports aren't just about the score at the end of the game. They're about sportsmanship and character. When athletes wear their jerseys, they're not only representing their team—they're also showing what it means to compete with respect. Good sportsmanship means playing hard but fair, supporting teammates, respecting opponents, and remembering that the way you play matters just as much as the result.

Sports also helps build character in ways that last far beyond the season. These athletes learn about accountability, loyalty, and commitment. Other valuable lessons include time management and responsibility as they need to balance homework and practice. From tough losses to big wins, they build resilience and humility. And most importantly, they learn what it takes to work together toward a common goal.

I am about as competitive as they come, but I do not believe in winning at all costs. While winning and receiving accolades are great, I hope our student-athletes and

coaches put character and sportsmanship above all else. Best of luck this season on and off the field or court!

With gratitude,  
Kelly Mason, School Board Chair

“Sports do not build character; they reveal it.” - John Wooden

*Board member notes are submitted directly by a school board member without edits from district staff.*



## SCHOOL BOARD MEETING RECAP

Click here for a high-level overview of some of the important topics from the last Regular School Board Meeting.

### CCPS FAMILY NEWS



#### HONORING HEROES - PAST AND PRESENT

In remembrance of 9/11, students at Manatee Elementary School held their first-ever Heroes' Walk, welcoming local first responders. Watch the video linked below until the end to see first

### CCPS FAMILY NEWS



#### SCHOOL CURRICULUM NIGHTS

All our schools host events where parents have an opportunity to step inside classrooms, talk with teachers, and see expectations firsthand, with



## COLLIER COUNTY CLASSROOMS NEED YOUR SUPPORT!

Champions For Learning's Classroom Grants Program is competitive grants process provides Collier County educators with an opportunity to apply for and receive funding for classroom supplies or equipment, local field trip costs, enrichment activities, and school-wide or innovative classroom projects. These projects, which are not covered under the school budget, are designed to spark excitement and engagement for students.



## HOW TO SUPPORT CLASSROOM GRANTS

Donors are able to support our overall execution of the program by making a gift to Champions For Learning's **Classroom Grant Fund**, or they can utilize the **online Classroom Grant portal** to hand select specific requests to fund.



Scan for  
Classroom  
Grant Fund



Scan for  
Classroom  
Grants Portal