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Topics

- Purpose of the Strategic Roadmap
- Expand Impact of Student Programs
- Expand Impact of Educator Programs
- Enhance Volunteer and Donor Engagement
- Strategic Roadmap Financial Implications
- Strategic Roadmap Resolution

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Mission Statement

Serve as a catalyst for educational success by investing in Collier's students and educators.

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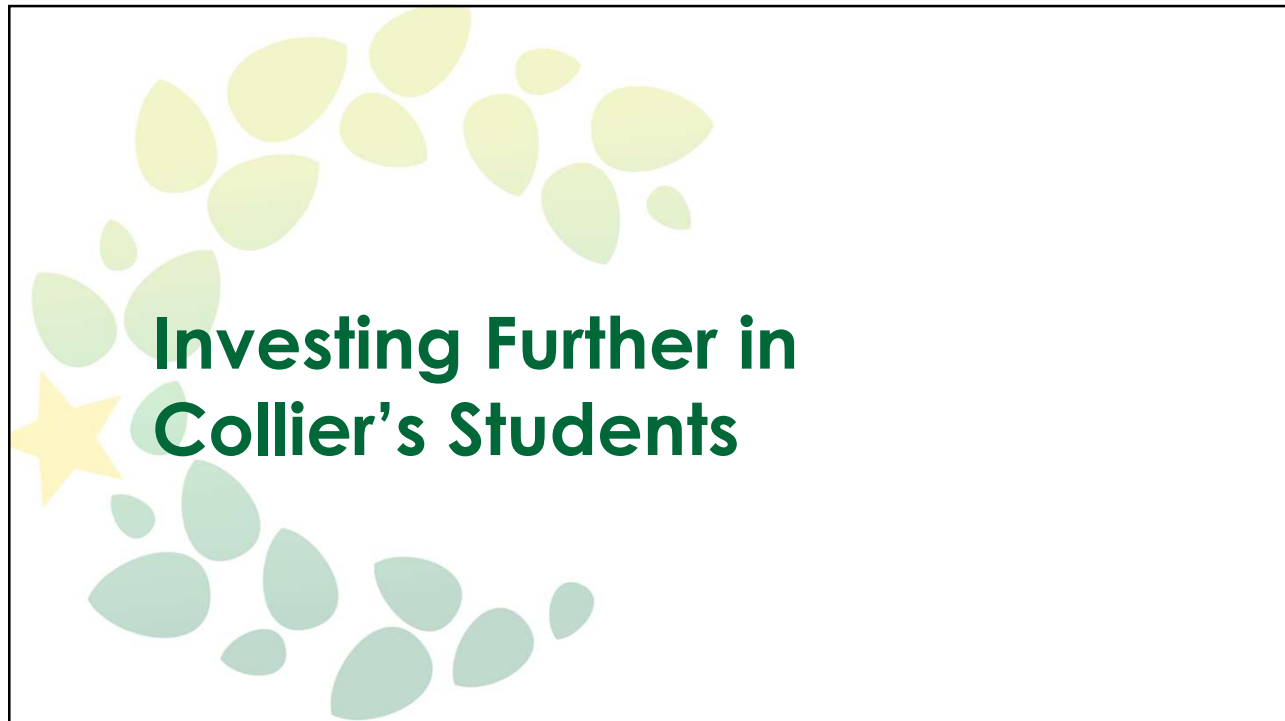


Purpose of Strategic Roadmap


Per 9/23/25 Board-Approved Process

- "Serve as a bridge between the current framework and a comprehensive, multi-year strategic plan . . . not a full-scale strategic plan"
- "will be simple, actionable, and designed to point the organization in the right direction"
- "will not provide perfect KPIs but will focus on a small set of measures that help us monitor progress and stay aligned"
- "By adopting the Roadmap in January 2026, the Board will provide clear direction...communicate to donors and partners that CFL is aligned and focused, and set the stage for a thoughtful, multi-year planning process"

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Expand Our Impact Immediately & Lay Foundation for Further Expansion

- Serve more students through grade 8 to 12 college and career prep programs by operating both Take Stock in Children and a parallel CFL program
- Serve more students through our grade 10 to 12 college and career prep program with a scholarship component
- Renew our emphasis on College & Career Access Support for high school students, regardless of whether they are enrolled in our college and career prep programs

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Reemphasis on College & Career Access Support

- Workshops/labs/individual consultations for students and parents focused on financial aid and scholarships
- Offered at high schools; CFL; and other locations throughout Collier County
- FY26 events YTD implemented in collaboration with CCPS, Collier Community Foundation, and Grace Place
- Reengage the wider Future Ready Collier Network

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Goal 1: Students are educated and empowered to choose and navigate their own path to success *No change*

1.1 Increase the number of students applying to and admitted to student programs *Revised*

Baseline

- **FY23 to FY25:** An average of 32 grade eight students and 27 grade ten students were admitted to student programs for an average total of 59 admitted students

KPIs

- **FY26 Admitted Students:** Admit 68 grade eight students and 40 grade ten students, and 10 grade eleven students to student programs for a total of 118 admitted students
- **FY27 Admitted Students:** Admit 70 grade eight students and 40 grade ten students for a total of 110 admitted students

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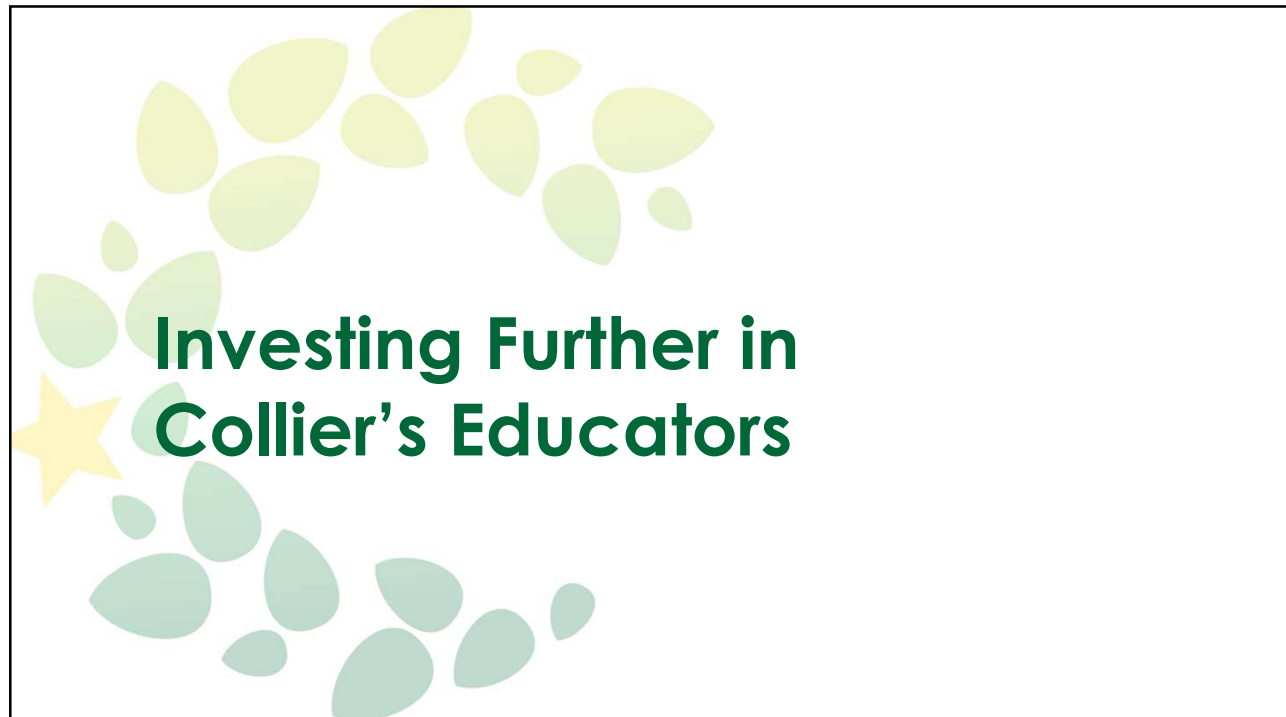
Goal 1: Students are educated and empowered to choose and navigate their own path to success *No change*

1.2 Increase the number of students and parents participating in college and career access support *Revised*

KPIs

- **FY26 College Access Support:** Support 300 students and 150 parents with college and career access support activities focused on specific topics such as the Free Application for Federal Student Aid (FAFSA) application and college scholarship applications
- **FY27 College Access Support:** Support 500 students and 250 parents with college and career access support activities focused on specific topics such as the Free Application for Federal Student Aid (FAFSA) application and college scholarship applications

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Expand Our Impact Immediately & Lay Foundation for Further Expansion

- Return to a community-wide expression of gratitude for large numbers of educators, culminating in a first-class Golden Apple Ceremony with a delayed tv broadcast
- Maintain classroom grants
- Award schoolwide innovation grants to test an approach to expanded, systemic impact

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Expansion of Educator Programs: Schoolwide Innovation Grants

- Maintain classroom grants while adding grants to provide systemic impact on a large scale
- Support the scaling of innovative classroom and schoolwide practices
- The grants could support implementation across multiple grade levels and content areas
- Award grants of approximately \$50,000 to each of three schools in FY27, FY28, and FY29 for a total of \$150,000 per school
- CCPS and CFL collaboratively identify one or more areas of need or specific innovative practices as the focus of each grant cycle
- Implementing an initial round of grants allows us to test this approach to impact, get feedback from stakeholders to inform iteration and consider expansion

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Goal 2: Educators have support and resources to experience professional success. *No change*

2.1 Strengthen the value and impact of our recognition programs for educators *No change*

Baseline

- **FY17 to FY25:** Zero Thank-A-Teacher Nomination Cards submitted
- **FY26:** 5716 Thank-A-Teacher Nomination Cards submitted relating to 1486 educators

KPIs

- **FY27:** 5700 Nomination Cards will be submitted relating to 1500 educators
- **FY27 Appreciation of Teachers of Distinction:** At least 75% of responding Teachers of Distinction report that they agree or strongly agree with the statement that "My experience this school year with the Golden Apple Teacher Recognition Program makes me feel more appreciated as a teacher"

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Goal 2: Educators have support and resources to experience professional success. *No change*

b. Increase the grant awards for educators *No change*

Baseline

- **FY20 to FY22:** An average of \$107,494 of classroom grants were funded annually; no schoolwide innovation grants were funded
- **FY23 to FY25:** An average of \$175,967 of classroom grants were funded (excluding grants funded with disaster relief dollars), with an average of \$128,535 funded directly by Champions For Learning; no schoolwide innovation grants were funded
- **FY26:** As of 12/12/25, an average of \$202,640 of classroom grants were funded, with \$148,567 funded directly by Champions For Learning; no schoolwide innovation grants were funded


KPIs

- **FY27:** At least \$200,000 of classroom grants will be funded
- **FY27 Schoolwide Innovation Grant Fundraising:** Approximately \$150,000 of Schoolwide Innovation Grants will be awarded (approximately \$50,000 to each of 3 schools) as the first phase of a three-year commitment

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Enhance Volunteer and Donor Engagement

- Honor the *passions and interests* of volunteers and donors
- Re-create *robust volunteer recruitment, engagement, support, and recognition* across all programs (college & career; educator; entrepreneurship)
- Implement a *systemic, donor-centered approach* to donor acquisition, qualification, cultivation, solicitation and stewardship that creates a *balanced pipeline of donors*

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Goal 3: Engage volunteers and donors as champions for learning, helping fulfill their passions and interests *New*

3.1 Sustain, expand, and improve volunteer recruitment, engagement, support, and recognition. *New*

3.2 Refine and implement community outreach and engagement strategies to secure volunteers. *No change*

Baseline

- **FY26 Volunteer Satisfaction Rate:** 97% of respondents reported in a December 2025 survey that they were satisfied or highly satisfied with their volunteer experience. 43% reported they are highly satisfied

KPIs

- **FY26 Learning Sessions/Connection Events:** Host a minimum of 23 learning sessions/connection events reaching 350 or more volunteers across all programs (student, educator, entrepreneurship)
- **FY27 Learning Sessions/Connection Events:** Host a minimum of 23 learning sessions/connection events reaching 650 or more volunteers across all programs
- **FY27 Volunteer Retention Rate:** Maintain a volunteer retention rate of at least 60% among volunteers who volunteered at least three hours in FY26.
- **FY27 Volunteer Satisfaction Rate:** At least 95% of respondents will report that they are satisfied or highly satisfied with their volunteer experience. At least 48% of respondents will report they are highly satisfied.

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Goal 3: Engage volunteers and donors as champions for learning, helping fulfill their passions and interests *New*

3.3 Build a more balanced donor pipeline by implementing a systematic approach to donor acquisition, qualification, cultivation, solicitation, and stewardship *New*

3.4 Cultivate and steward donors through authentic, donor-centered relationships that honor their passions and celebrate the impact of their giving *New*

3.5 Generate sustainable revenue, aligning donor partnerships with organizational priorities *New*

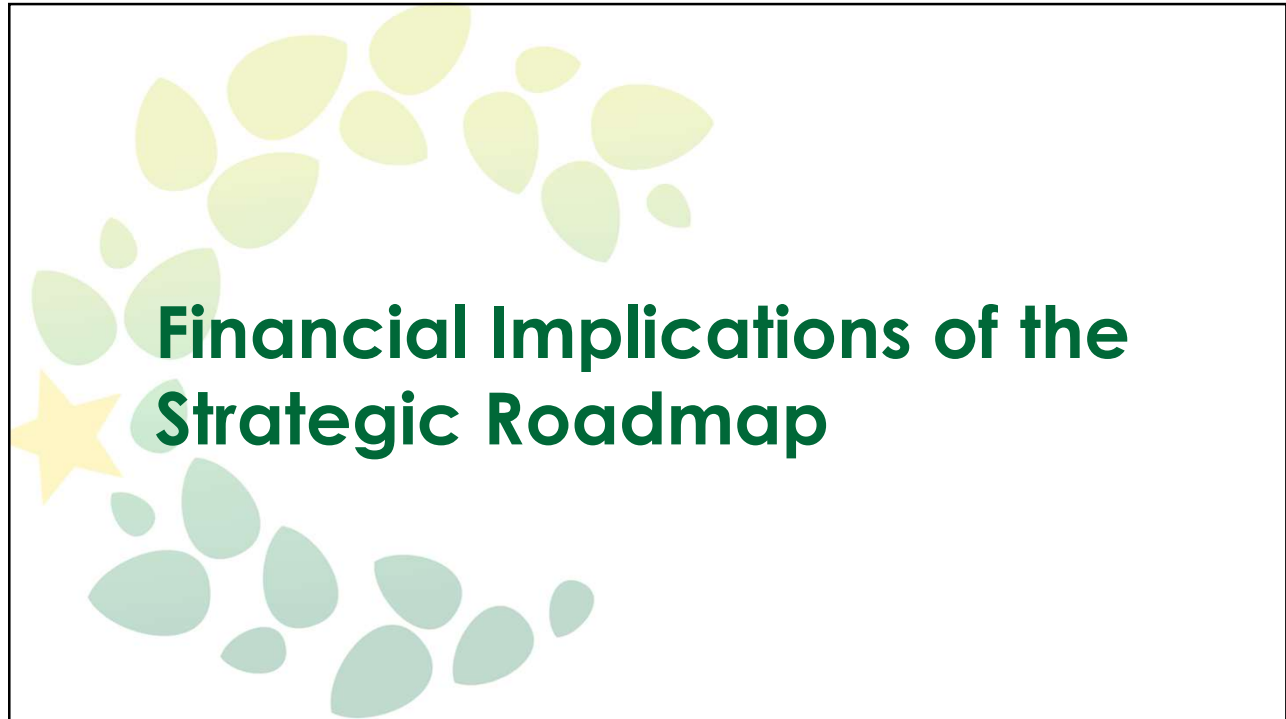
Baseline

- **FY25 Total Dollars Raised (Income):** \$3,286,913 of income classified as Foundation Revenue/Grants, Governmental Grants, Individual Contributions/Family Foundations, and Corporate/Organizational Revenue
- **CY21-CY25 Average Number of Donors:** Gifts up to \$499: 289 donors; gifts between \$500 and \$999: 50 donors; and gifts between \$1,000 and \$249,999: 191 donors
- **CY21-CY25 Average Gift Size:** Gifts up to \$499: \$142; gifts between \$500 and \$999: \$579; and gifts between \$1,000 and \$249,999: \$10,216

KPIs

- **FY26 Total Dollars Raised:** Raise at least \$3,445,000 of income classified as Foundation Revenue/Grants, Governmental Grants, Individual Contributions/Family Foundations, and Corporate/Organizational Revenue, as assumed in the FY26 budget.
- **CY26 Number of donors:** Increase the number of donors by 4% per level above CY21-CY25 averages to 300 donors (up to \$499); 52 donors (\$500-\$999); and 199 donors (\$1,000-\$249,000)
- **CY26 Average Gift Size:** Increase the average gift size per level by 4% above CY21-CY25 averages to \$148 (up to \$499); \$602 (\$500-\$999); and \$10,625 (\$1,000-\$249,000)

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Net Program Expansion Expenses	
FY26	
Projected Total Operating Deficit, excluding one-time gift received	(\$335,000)
One-time Program Expansion Gift Received	\$500,000
Purchase of Additional Scholarships	\$55,288
Projected FY26 Ending Operating Surplus	\$109,712
FY 26 & FY27	
Purchase of Additional Scholarships	(\$173,079)
School-wide Innovation Grants (3x\$50K, Year 1 of 3)	(\$150,000)
Other (Chief Program Officer & Additional Non-Personnel Expenses)	(\$232,500)
Total FY26 & 27 Expansion Expenses	(\$555,579)
FY28	
Purchase of Additional Scholarships	(\$181,271)
School-wide Innovation Grants (3x\$50K, Year 2 of 3)	(\$150,000)
Other (Chief Program Officer & Additional Non-Personnel Expenses)	(\$241,315)
Total FY28 Expansion Expenses	(\$572,586)
Net FY26 to FY28 Expansion Expenses	(\$1,018,452)

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Program Expansion Source of Funds	
Unrestricted Cash Reserves (above 4 months operating capital)	\$450,000 ¹
Unrestricted Endowment Cash Reserves	\$1,080,000 ²
Total Source of Funds	\$1,530,000
Use of Funds (Net FY26-FY28 Expansion Expenses)	\$1,018,453³
Remaining Cash Surplus after Expansion (above 4 months operating capital)	\$511,547

¹Total unrestricted cash reserves at Everbank and Schwab equal \$1.8m, as of 11/30/25, which covers 5.3 months of operating expenses (\$350K per month), and is \$450K above the 4-month operating threshold

²

Total "Endowment" at CCF (11/30/25 Value	\$5,475,000
Less: Permanently Restricted Endowment	(\$2,500,000)
Less: Principal Value Unrestricted Endowment	<u>(\$1,895,000)</u>
Unrestricted "Endowment" Cash Reserves	\$1,080,000

³The amount of funds used equals Net FY26-FY28 Expansion Expenses, drawn from the last row of the previous slide.

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Lower Per Student Costs with Expansion Model


	Current Trajectory	Proposed FY 26 & 27 Expansion
Total Costs	\$1,734,229	\$2,195,096
% Increase in Costs		27%
# Students Served	241	470
% Increase in Students Served		95%
Per Student Cost	\$7,196	\$4,670
Decrease in Per Student Cost		35%

This table illustrates expense information relating to the current trajectory (based on FY23-FY25 enrollment averages persisting for five years) and a one-year build-out of the proposed expansion model. Also, fyi, the state TSIC program funds only a small portion (\$125,802; less than 7%) of FY26 student program expenses. Projected TSIC revenue would decline by only \$5,000, approximately. This is based on FY26 costs.

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Whereas Clauses – Context and Rationale

- Reaffirms mission to invest in students and educators
- References Board-approved Strategic Roadmap process
- Establishes the need for a current, Board-adopted framework to align priorities and resources
- Clarifies that the Roadmap is focused, actionable, and not a full strategic plan
- Emphasizes the use of a small set of KPIs to support alignment and Board oversight

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Whereas Clauses – Expansion

- Affirms continued focus on student and educator programs, with stronger volunteer and donor engagement
- Recognizes significant unmet needs among Collier County students and educators
- Highlights expanded collaboration with Collier County Public Schools and community partners
- Grounds expansion in financial analysis, including projected FY26 revenues and expenses as well as reserves
- Cites external analysis, including the Krupa program audit, identifying opportunities for scalable impact
- Reflects the Board's expressed desire to responsibly expand reach and deepen impact

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Be It Resolved Section

- Formally adopts the Roadmap for January 2026 through June 2027
- Confirms the Board's governance role in setting direction, approving budgets, and monitoring performance
- Delegates operational planning, staffing, and implementation to the President & CEO
- Authorizes flexibility to adjust tactics and timelines within Board-defined guardrails
- Establishes expectations for regular reporting on Roadmap KPIs
- Approves use of up to \$450,000 in unrestricted cash reserves and up to \$568,453 in unrestricted endowment cash reserves across FY26 to FY28
- Authorizes recruitment for a Chief Program Officer for FY27 with hiring contingent on Board-approved budget
- Signals commitment to program expansion, innovation, and data-informed continuous improvement

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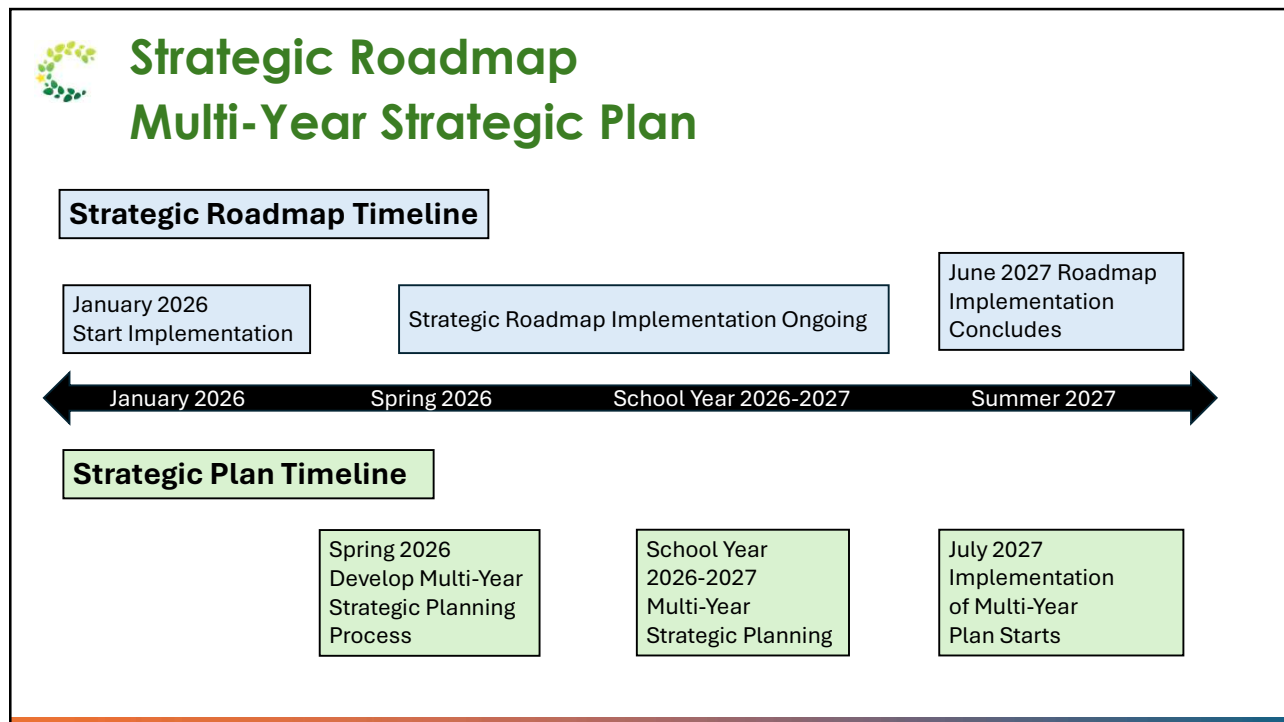
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Strategic Roadmap versus Multi-Year Strategic Planning

- The process for creating a multi-year strategic planning would be a collaborative effort in which the Board sets strategic direction and approves the final plan, while staff manages the planning process within Board-defined parameters and develops draft documents for Board consideration.
- The process of developing the multi-year strategic plan will involve numerous conversations among members of the Board of Directors. These conversations would occur at meetings of the Strategic Planning Committee, the full Board of Directors, and perhaps at a Board of Directors strategic planning retreat.
- Collier County Public Schools and other stakeholders would be engaged as well

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Champions For Learning (CFL) CURRENT Student Programs

- Take Stock In Children (TSIC) admits students in grade 8 and serves them through grade 12
 - Includes mentors, college/career success coaches, workshops/labs, college campus visits, 2-year Florida Pre-Paid (FPP) scholarships, and possibility of earning 2-year FPP College Complete scholarships
- College & Career Prep (CCP) admits students in grade 10 and serves them through grade 12
 - Includes college/career success coaches, workshops/labs, college campus visits; eligible students earn 2-year FPP scholarships and possibility of College Complete scholarships
 - No mentoring component
- College & Career Access Support workshops are open to all Collier students i.e. FAFSA, college scholarships
 - Offered at high schools, Champions For Learning, and other locations

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Why Offer a CFL Parallel Program

- Greater program flexibility enables expansion with comparable benefits to participants anticipated.
- Locally designed program would involve substantially more workshops than TSIC requires.
- Advocacy meetings with College/Career Success coaches would use a blended model of small-group and individual sessions, allowing staff to serve more students. TSIC requires all individual sessions.
- Economies of scale will make it easier to host some workshops, labs, and Advocacy meetings at schools.
- Requiring fewer mentor sessions than TSIC requires makes expectations more feasible for mentors and students; significantly reduces staff time on follow-up and reminders; and supports the recruitment and retention of a larger group of mentors.
- Some mentoring sessions could be small group, making it easier for mentors to serve multiple mentees and supporting the recruitment of volunteers who would like to learn from other mentors. TSIC requires individual mentoring sessions.
- Mentors would report mentor sessions periodically directly to CFL staff rather than documenting each session in the TSIC app, improving the volunteer experience and shifting staff time away from administrative tracking and toward serving more students.
- Efficiency of the parallel program allows expansion without increasing the number of College/Career Success Coaches.

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Enrollment – Current Trajectory

	TSIC	CCP	Total
Grade 8	32		
Grade 9	32		
Grade 10	32	27	
Grade 11	32	27	
Grade 12	32	27	
Total	160	81	241

This table illustrates enrollment if FY23-FY25 enrollment averages persist for five years.

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Admitted Students – Historical vs. Proposed

Fiscal Year	Grade 8	Grade 10	Total
FY23 – FY25 Average	32	27	59
FY26 – Proposed Contingent on Funding	68 (30 TSIC; 38 parallel program)	40	118 (includes ten grade 11 students)
FY27 – Proposed Contingent on Funding	70 (30 TSIC; 40 parallel program)	40	110
FY28 and beyond	Let's Think Big!		

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Capacity - Proposed Build-Out

	TSIC	Students Admitted to CFL Version in Grade 8	Students Admitted to CFL Version in Grade 10	Total
Grade 8	30	40		
Grade 9	30	40		
Grade 10	30	40	40	
Grade 11	30	40	40	
Grade 12	30	40	40	
Total	150	200	120	470

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Expansion of Student Programs

These *operational* details are designed to illustrate the concept of implementing a scalable structure for increasing participation in student programs.

	TSIC Program Requirements	CFL Parallel Program Requirements
# Mentor Sessions: Grade 8	6 individual	2 small group*
# Mentor Sessions: Grades 9-12	16 individual	6 small group*
# College/Career Success Coach Sessions: Grade 8	1 individual	2 small group*
# College/Career Success Coach Sessions: Grades 9-10	2 individual	2 small group*
# College/Career Success Coach Sessions: Grades 11-12	4 individual	Grade 11: 3 small group*, 1 individual; Grade 12: 2 small group*, 1 individual
# Workshops : Grade 8	1	2-3
# Workshops: Grades 9-10	3	8-10
# Workshops: Grades 11-12	2	8-10

*small group sessions include multiple mentors and mentees

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Student Program Income Eligibility Criteria

– other criteria also exist

- Grade 8 students admitted to TSIC must meet the eligibility requirement for Florida Pre-Paid Project Stars scholarships. For example, in FY26 the max annual household income for a family of four is \$59,478.
- Grade 8 students admitted to our parallel program in FY26 must meet the eligibility requirement for Florida Pre-Paid In-Demand scholarships. For example, in FY26 the max annual household income for a family of four is \$89,478. Starting in FY27 the program would use the Project Stars eligibility criteria referenced in the preceding bullet.
- Students admitted to our Grade 10 program in FY26 must live in a household with a combined 2024 income of less than \$137,532. To earn an In-Demand scholarship these students must meet the criteria referenced in the preceding bullet.

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Branding

- Current
 - Take Stock in Children (grades 8-12)
 - College & Career Prep (grades 10-12)
- Primary Option Previously Under Consideration - College & Career Prep Programs
 - Take Stock in Children (grades 8-12)
 - Pathway Promise - Foundations (grades 8-12)
 - Pathway Promise - Launch (grades 10-12)
- Current Primary Option Under Consideration - College & Career Prep Programs
 - Take Stock in Children (grades 8-12)
 - Pathways to Success - Foundations (grades 8-12)
 - Pathways to Success - Accelerate (grades 10-12)

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A graphic for a 'Strategic Roadmap' meeting. It features the title 'Strategic Roadmap' in large green font, with '1/20/2026' and 'Board of Directors Meeting' below it. The background is decorated with green leaf-like shapes and a yellow star on the left side.

Strategic Roadmap

1/20/2026
Board of Directors Meeting

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