



**Proposed Strategic Planning Process and Timeline**  
**Champions For Learning**  
**Revised May 1, 2026 based on input from the Strategic Planning Committee**

Champions For Learning is currently guided by a Strategic Roadmap that runs through June 2027. That roadmap provides direction for the organization’s near-term priorities, including expansion of student and educator programs. The next step is the development of a multi-year strategic plan, which is proposed to cover three fiscal years from July 1, 2027 through June 30, 2030.

The purpose of the strategic planning process will be to help the Board of Directors and staff reflect on community needs, organizational strengths, and opportunities for greater impact, and to establish priorities that will guide the organization.

The strategic plan will be designed as an agile, responsive document. While it will establish clear priorities and goals, it will not attempt to predict every future condition or constrain the organization to a fixed course of action. Instead, the plan will provide direction while allowing the organization to adapt as new information, opportunities, and challenges emerge.

Examples of key questions that staff, the Strategic Planning Committee, and the Board of Directors may consider during this process include:

- What role or roles should Champions For Learning play to have the greatest impact on educational outcomes in Collier County?
- What is the right pace and scale of growth for Champions For Learning over the next three years to increase impact while maintaining or improving quality?

The Board of Directors will receive updates regarding the strategic planning process at each of its meetings before adoption of the strategic plan.

This document sets forth a general process to guide strategic planning. It is not a rigid schedule. As the process unfolds, adjustments may be made to reflect new insights, emerging opportunities, or feedback from the Strategic Planning Committee or Board of Directors. This document includes a page relating to the roles of the CEO & President, the Strategic Planning Committee, and the Board of Directors.

Spring 2026  
Planning Process Design

The Strategic Planning Committee and Executive Committee provide feedback on the proposed strategic planning process. The President & CEO incorporates feedback and recommends a strategic planning process to the Board of Directors for potential approval at its meeting on May 19, 2026.

## Summer 2026

Champions For Learning staff members will plan the environmental scan (assessment of context) and strategic conversations, while also initiating data collection.

## September and October

### Environmental Scan and Strategic Conversations

During this phase, the organization will gather information to help inform strategic discussions with the Board. The environmental scan may include:

- stakeholder input
- trends in student needs and outcomes in Collier County
- priorities and initiatives of Collier County Public Schools
- performance and impact of current Champions For Learning programs
- the broader landscape of organizations supporting student success
- philanthropic and funding trends

Staff will analyze information from the environmental scan and strategic conversations and present the analysis to the Strategic Planning Committee for feedback. Staff will refine the analysis based on input from the Strategic Planning Committee and present it to the Board of Directors for review.

## Winter 2027

### Development of Strategic Priorities

Staff will utilize insights from the environmental scan, stakeholder input, as well as discussions with the Strategic Planning Committee and Board of Directors to develop a draft strategic plan. The plan will include a mission statement, goals, strategies, baseline data and KPIs similar to the strategic roadmap. The Strategic Planning Committee will provide input regarding the draft. Staff will use this input to further revise the draft. The Board of Directors will receive updates regarding work on the strategic plan. Following iterative work with the President & CEO, the Strategic Planning Committee will vote to support the plan recommended by the President & CEO.

## Spring 2027

### Board Review and Adoption of Strategic Plan

The Board of Directors will review the draft strategic plan. Following discussion and potential refinement, the Board will approve the 2027–2030 strategic plan. Approval would likely occur in March 2027 but could be delayed until May 2027.

## July 1, 2027

### Implementation Begins

The organization will begin implementing the priorities outlined in the new strategic plan.

### Roles – Strategic Planning Process

<u>President &amp; CEO and Staff</u>	<u>Strategic Planning Committee</u>	<u>Board of Directors</u>
<p>The President &amp; CEO will lead the strategic planning process.</p> <p>Responsibilities include:</p> <ul style="list-style-type: none"> <li>• designing and managing the planning process</li> <li>• gathering and analyzing information to inform strategy</li> <li>• engaging stakeholders and partners</li> <li>• developing draft strategic priorities and recommendations</li> <li>• presenting recommendations to the Board of Directors for discussion and approval</li> </ul> <p>Staff will support the process through program analysis, data collection, and operational planning.</p>	<p>The Strategic Planning Committee serves in a steering and advisory capacity, providing input and perspective throughout the planning process. Following this iterative collaboration, the Committee votes to support the Strategic Plan developed and recommended by the President &amp; CEO prior to its consideration by the Board of Directors.</p> <p>The committee will:</p> <ul style="list-style-type: none"> <li>• provide feedback on the proposed planning process and timeline</li> <li>• offer perspective on strategic questions that may guide board discussions</li> <li>• identify stakeholders whose perspectives might be helpful for the Board to understand</li> <li>• provide advice as ideas emerge during the planning process</li> </ul>	<p>The Board of Directors retains full governance authority over the strategic direction of Champions For Learning.</p> <p>During the planning process, the Board will:</p> <ul style="list-style-type: none"> <li>• approve the strategic planning process</li> <li>• participate in strategic discussions during the planning process</li> <li>• provide guidance on organizational priorities and direction</li> <li>• approve the final strategic plan</li> </ul> <p>The Board’s role is to set strategic direction, not to design or manage the planning process itself.</p>