



## Navigator Schools

### Development Committee Meeting

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#### Date and Time

Friday January 17, 2025 at 11:00 AM PST

#### Location

Laura Marco is inviting you to a scheduled Zoom meeting.

Topic: Development Committee Meeting

Time: Jan 17, 2025 11:00 AM Pacific Time (US and Canada)

#### Join Zoom Meeting

<https://navigatorschools.zoom.us/j/99963431244?pwd=IcJQnUralmxamcNbGZgoagC6WA0jDU.1>

Meeting ID: 999 6343 1244

Passcode: 446882

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#### One tap mobile

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This meeting will be held in compliance with modified Brown Act requirements as outlined in Executive Order [N-25-20](#).

Individuals in need of a disability-related accommodation, modification, or auxiliary aid/service, should direct requests [via e-mail](#) to Ami Ortiz, Director of Compliance & Operations.

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## Agenda

	Purpose	Presenter	Time
<b>I. Opening Items</b>			<b>11:00 AM</b>
<b>A.</b> Call the Meeting to Order		Chuck Daggs	1 m
Chuck Daggs, Committee Chair, will call the meeting to order.			
<b>B.</b> Record Attendance & Guests	Vote	Chuck Daggs	1 m
Chuck Daggs, Committee Chair, will identify guests and hold a roll-call vote to take attendance.			
<b>C.</b> Committee Chair Update		Chuck Daggs	5 m
The committee Chair will review recent committee activities, objectives, and priorities.			
<b>D.</b> Public Comments		Chuck Daggs	1 m
The committee chair will review requests for public comments (if any).			
<b>II. Development</b>			<b>11:08 AM</b>
<b>A.</b> Fundraising Development Strategy	Discuss	Shun Dorsey	50 m
Shun Dorsey, Development Officer. will present the Fundraising Development Strategy for the next three years.			
<b>III. Closing Items</b>			<b>11:58 AM</b>
<b>A.</b> Schedule Next Committee Meeting	Discuss	Chuck Daggs	1 m
The committee will confirm the date and time of its next meeting.			
<b>B.</b> Adjourn Meeting	Vote	Chuck Daggs	1 m
Members will vote on the approval of meeting adjournment.			

# Coversheet

## Funraising Development Strategy

**Section:** II. Development  
**Item:** A. Funraising Development Strategy  
**Purpose:** Discuss  
**Submitted by:**  
**Related Material:** Fund Development Strategy 2025.pdf



# Navigator Schools Fund Development Strategy

Development Committee Meeting January 16, 2025

# **Our 3-year strategy aims to articulate our plan to create a diversified support base to fund Navi projects and programs that are difficult to support solely with state and federal funds.**

- **In 2023-24, the board prioritized hiring a Development Officer and launching a comprehensive Development Strategic Plan.**
- **Learning: Our students and their families have significant needs beyond what our baseline government funding provides.**
- **The key driver of our strategic plan is to address the critical needs of students and families.**
- **The major components of our strategic plan are:**
  - **target audience (potential donors) messaging and branding;**
  - **outreach methods by target audience;**
  - **operational efficiencies;**
  - **collaborations;**
  - **signature events; and,**
  - **creation of the Navigator Scholars Enrichment Fund (NSEF).**
- **We are developing a strong pipeline to achieve our FY 2025-26 fundraising goals.**
- **Board-level leadership is critical to our fundraising success: time, treasure, talent.**

# In 2023-24, the board prioritized hiring a Development Officer and launching a comprehensive Development Strategic Plan.



Accomplishments to date	
Partnership Development	In 2024 we Identified strong potential corporate partners including: AmeriCorps, Ricoh, POMS & Associates, Verizon Learning, and the City of Watsonville
Grant Success	Our Grant Success during 2024-25, so far we have earned grant awards from the Charter Schools Growth Fund, Schwab, and Silicon Schools Fund, totaling more than \$1.5 million
Program Launch	We launched our first Annual Giving Tuesday campaign- raising a total of..and launched a sponsorship campaign with Benchcraft Golf setting the foundation for our ongoing donor engagement strategy.
Internal Systems	Our internal systems efforts have resulted in the exploration of a CRM implementation for streamlined donor management and we launched a streamlined survey campaign for improved data collection.

# Learning: Our students and their families have significant needs beyond what our baseline government funding provides.

<p><b>Fundraising Strengths, Needs, and Gaps</b></p>	<ul style="list-style-type: none"> <li>● <b>Strengths:</b> Navigator Schools has historically excelled at securing grants from a few highly aligned foundations, which have been the backbone of our fundraising efforts.</li> <li>● <b>Needs:</b> Covid learning loss funding has ended, but increased student needs have not.</li> <li>● <b>Gaps:</b> By relying on grants alone, Navigator Schools misses out on important resources available in our communities. We've never implemented a donor-based strategy, limiting our ability to cultivate diverse funding sources and expand financial resilience.</li> </ul>
<p><b>ELOP Deficit</b></p>	<ul style="list-style-type: none"> <li>● ELOP funding falls short of covering the full costs of afterschool programs, leaving students without consistent access to enrichment opportunities.</li> <li>● When enrichment is provided, it often creates a financial draw on general funds that strains other resources.</li> </ul>
<p><b>Transportation Challenges</b></p>	<ul style="list-style-type: none"> <li>● Transportation issues are a major contributor to absenteeism.</li> <li>● One important solution has been sending <b>rideshare services (e.g., Ubers)</b> to pick up students, especially homeless and foster youth.</li> </ul>
<p><b>Parent Engagement</b></p>	<ul style="list-style-type: none"> <li>● Engaging parents remains a challenge. A more structured approach is needed to involve families in supporting their children's education and fostering a stronger community connection.</li> </ul>
<p><b>Wrap-Around Services</b></p>	<ul style="list-style-type: none"> <li>● Many students and families lack access to vital resources such as mental health services, nutrition programs, and extracurricular support.</li> </ul>
<p><b>STEM Enrichment</b></p>	<ul style="list-style-type: none"> <li>● As the demand for STEM skills grows, our current school day is insufficient to prepare students for future opportunities.</li> </ul>



# The key driver of our strategic plan is to address the critical needs of students and families.

## Fundable Projects and Ongoing Needs

<p><b>Student-Centered Opportunities</b></p>	<ul style="list-style-type: none"> <li>● Family food baskets during school breaks (no longer funded by the state)</li> <li>● Experiential learning (field trips, camps)</li> <li>● After School enrichment programs</li> <li>● STEM initiatives</li> <li>● Mental wellness support</li> </ul>
<p><b>Infrastructure and Expansion</b></p>	<ul style="list-style-type: none"> <li>● Hayward Collegiate playground expansion</li> <li>● Vehicles and transportation</li> <li>● Organizational growth (new school development)</li> </ul>
<p><b>Multilingual Learners</b></p>	<ul style="list-style-type: none"> <li>● Create opportunities for experiential language acquisition</li> </ul>
<p><b>Innovative Practices</b></p>	<ul style="list-style-type: none"> <li>● Piloting and scaling innovative educational approaches</li> <li>● Creative partnerships to deliver talent (e.g., Americorp)</li> </ul>
<p><b>Community and Alumni Engagement</b></p>	<ul style="list-style-type: none"> <li>● Family engagement initiatives</li> <li>● Alumni pathways and ongoing support (secondary and college education)</li> </ul>

# The major components of our strategic plan are: target audience (potential donors) messaging and branding...

Development and Communications leaders are working together to create messages that speak to each potential groups:

<b>Board and Leadership Team</b>	<i>"Please give and encourage others to do so. Let people know why Navi inspires you!"</i>
<b>Internal Stakeholders (Staff and Families)</b>	<i>"Please donate and inspire your friends and family to help provide the 'extras' that you know our scholars need to succeed. Your generosity directly enhances the learning environment, creating opportunities for all students to thrive."</i>
<b>Vendors</b>	<i>"Your partnership with us goes beyond transactions. By donating, you contribute to the vibrant community you support professionally and demonstrate your commitment to the future leaders emerging from our schools."</i>
<b>Corporations</b>	<i>"Invest in the next generation by supporting educational excellence in your community. Your donation reflects your commitment to social responsibility and helps build a skilled, engaged workforce for the future."</i>
<b>Foundations</b>	<i>"Join us in creating equitable opportunities for all scholars. By supporting our mission, your foundation can drive measurable outcomes in education and help us close opportunity gaps in underserved communities."</i>
<b>Local Governments</b>	<i>"Partner with us to build a stronger, more resilient community. Your support will ensure that every scholar has the resources they need to succeed, contributing to a brighter future for our city."</i>
<b>High-Net Worth Individuals</b>	<i>"Make a transformative impact on education and leave a legacy of opportunity. Your investment in our scholars will empower them to reach their full potential and inspire a generation of leaders who will give back to their communities (ADD: 2-fer and impact on the community")</i>

# The major components of our strategic plan are: outreach methods by target audience...

Each target audience is engaged in a customized fashion

Target	Vehicles	Campaigns
Internal Stakeholders	Parent Square, internal emails, social media	Giving Tuesday, other regular events that become traditions
Vendors	Email outreach with personalized messaging Vendor appreciation events Social media (tag vendors in posts)	Vendor spotlight posts Matching gift challenges
Corporations	Corporate sponsorship packages Networking events	PR Campaigns “Invest in the Future” Campaign: Encourage corporate sponsorship of specific school programs (e.g., STEM labs or literacy initiatives)
Foundations	Grant proposals tailored to foundation priorities Invitations to school events showcasing impact Annual reports card and impact stories	Annual fund appeal
Local Gov	Formal proposals(Annual report card)..	“Stronger Together” Campaign: Focus on the shared benefits of supporting local schools School showcases
High-Net Worth Individuals	Peer networks, personalized outreach..	Transformational Giving” Campaign Leadership circles Naming rights opportunities
Unique Efforts	Possible development of an annual “Try Outs” day Collaboration with influencers/ local celebs Partnerships with non-traditional sponsors	“Think Outside the Box” Campaign: Drive funding through unconventional means, such as crowdfunding or pop-up events

# The major components of our strategic plan are: operational efficiencies...

Operational Process	Status
<b>Internal cross-departmental team collaboration cadence and tools (e.g., Dev and Comms, Dev and Local government relations, Dev and Finance)</b>	<b>Initiated.</b> Established a regular biweekly meeting schedule between Development and Communications, Local Government Relations, and Finance. We've established grants management and compliance framework, grant tracking, and currently assessing best tools (Slack, Asana) for streamlined communication and task tracking.
<b>Fundraising policies</b>	<b>In Progress.</b> Drafting comprehensive policies for donor engagement, gift acceptance, and restricted funds. Reviewing best practices with Finance and Legal teams for compliance.
<b>Customer relationship management</b>	<b>In-Progress:</b> Finalizing implementation for Hubspot as the primary CRM tool. Planning data entry standardization and team training for Q1 with a goal of full CRM utilization by Q2 2025
<b>Mail and messaging management</b>	<b>In-Progress:</b> Standardized templates for donor communications in use. Exploring tools like Mailchimp and Hubspot for bulk messaging and campaign analytics.
<b>Website donor button and backend donation processes</b>	<b>Implemented.</b> Donation button live on the website. Finalizing backend processes for one-time and monthly giving tiers to be operational by February 2025. Monitoring engagement analytics and troubleshooting as needed.
<b>Accountability/analytical practices (make routine)</b>	<b>Finalizing:</b> Monthly dashboard reports for fundraising and donor engagement under review. Migration from Google Spreadsheets to Hubspot by Q2 2025. Plan to incorporate key performance indicators (KPIs) into quarterly board meetings by Q3 2025
<b>Annual Report Card( (glossy hard copy, PDF, and digital web-version))</b>	<b>In Progress:</b> Content outline completed. Drafting sections for glossy hardcopy, PDF, and website integration. Target release: Q2 2025.
<b>Internal documents databank</b>	<b>In Progress:</b> Organizing Google Drive for team-wide access to policies, reports, and templates. Goal: Launch a centralized data bank by Q2 2025

# The major components of our strategic plan are: collaborations...

Collaborations	Status
<p><b>Ricoh: aligns with our need for tech and enrichment</b></p>	<ul style="list-style-type: none"> <li>● November 2024- submitted a \$4MM, 5-year proposal to collaborate on expanding the Navi Impact and Squads models.</li> <li>● Following discussions, Ricoh proposed new areas of support, including:                             <ol style="list-style-type: none"> <li>a. Sponsoring STEM labs and makerspaces.</li> <li>b. Becoming a tech partner to equip classrooms with Ricoh’s 3D printers.</li> </ol> </li> <li>● We are currently revising the proposal for a January submission to reflect this updated focus on ELOP support.</li> </ul>
<p><b>Americorps: aligns with our need for talent</b></p>	<ul style="list-style-type: none"> <li>● Preparing for <b>March 2025</b> grant submission to support our initiative focuses to utilize AmeriCorps VISTA members to serve as Small Group Instructors (SGI), Full Inclusion Instructors (FII), and Teachers in Training (TNT).</li> </ul>

# The major components of our strategic plan are: signature events...

Navigator Schools turns 15-years-old in 2025-26.

It's time for a

*Quinceañera!*



- Launch our inaugural annual signature event in 2025 to celebrate Navigator Schools' 15th anniversary: *Navigator Schools Quinceañera*.
  - The event will honor our journey, celebrate our achievements, and showcase the impact of our programs.
  - Create a celebration that reflects the rich cultural heritage of our community, fostering a sense of belonging and pride.
  - Highlight and support our Multilingual Learner (MLL) population by showcasing student achievements and opportunities made possible through fundraising..
- 
- Leverage the event to build a sustainable donor base by engaging alumni, families, and corporate sponsors.
  - Use this platform to secure long-term financial support for programs that enrich students' educational experiences.

# The major components of our strategic plan are: creation of the Navigator Scholars Enrichment Fund (NSEF).

Through the Navigator Schools Support Corporation, we will create and brand a Navigator Scholars Enrichment Fund as our specific vehicle for fundraising to address the learning and life needs of our students not met by our ongoing government funding.

## **Afterschool Enrichment**

- Expand experiential learning opportunities for Multilingual Learners (MLL) and economically disadvantaged students, including field trips for students and families
- Goal: \$50K to fund literacy-focused trips for our MLL population (1000 students)

## **Basic Needs Fund**

- Establish an emergency fund to support food, transportation, and family emergencies
- Goal: \$190K (\$100 per pupil for 1,900+ students)

To augment our board engagement, we will create an advisory group to lead the Navigator Scholars Enrichment Fund consisting of individuals who are more enthusiastic about fundraising than they are about governing and school operations.

# We are developing a strong pipeline to achieve our FY 2025-26 fundraising goals

Pipeline	Purpose	Source	2025-26 Goal	Likelihood
<b>Already committed</b>	New Schools and new ELA implementation, 2nd Year of Community Schools (WPS)	CSGF, CDE	\$887,000 \$300,000	100%
<b>Requested</b>	Growth	US Dept of Ed (\$15.9m over 5 yrs)	\$4,200,000	60%
<b>Anticipated requests from current funders prior to 6/25 for FY 2025-26</b>	Community Schools Partnerships (HC, GP, HP), Ignite Matching Grant, Consulting for ELA Implementation, Growth (First two schools), General operations	CDE (\$300k per school each year for 5 yrs), SSF, CSGF, Schwab	\$1500000 \$100,000 \$800,000 \$250,000	25-80%
<b>New foundation and benefactor relationships</b>	Navigator Scholars Enrichment Fund, Multilingual Learners, and Growth	Sobrato Omidyar Emerson Collective Monterey Community Foundation Others	Goal: \$100,000	TBD
<b>Corporate partnerships</b>	Navigator Scholars Enrichment Fund Access to Americorp Volunteers to fill hard to staff entry-level roles	Ricoh and POMS & Associates AmeriCorps Others	Goal: \$200,000	TBD
<b>Individuals, vendors, and partners</b>	Navigator Scholars Enrichment Fund	Quinceañera Giving Tuesday Benevity.com	Goal: \$150,000	50%



# Board-level leadership is critical to our fundraising success: time, treasure, talent.

## What do you need as a board members to become effective ambassadors to drive our mission forward?

<h3>Training and Development</h3>	<ul style="list-style-type: none"> <li>● Conduct a <b>Board Fundraising Workshop</b> focused on effective strategies for donor cultivation, solicitation, and stewardship.</li> <li>● Provide board members with personalized coaching to refine their elevator pitches and storytelling skills, enabling them to effectively communicate their "why" and the importance of supporting Navigator Schools.</li> <li>● Distribute a <b>Board Fundraising Playbook</b> with resources, including talking points, FAQ sheets, and a calendar of fundraising opportunities.</li> </ul>
<h3>Sponsor Identification</h3>	<p>Implement a <b>Board Sponsorship Plan</b> that:</p> <ul style="list-style-type: none"> <li>● Encourages members to map out their networks for potential sponsors and high-value individual donors.</li> <li>● Includes facilitated sessions where Development staff assist members in identifying connections and crafting customized sponsorship outreach plans.</li> </ul> <p>Create a shared sponsor tracking system for board members to log outreach progress and ensure coordinated efforts.</p>
<h3>Underscoring Governance Level Commitment</h3>	<p>Establish clear expectations for board participation in fundraising activities, including:</p> <ul style="list-style-type: none"> <li>· Attending key donor cultivation events.</li> <li>· Joining Development staff on top-tier fundraising visits to demonstrate commitment at the governance level.</li> <li>· Writing personal thank-you notes to major donors to enhance stewardship efforts.</li> </ul>

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## What do you need as a board members to become effective ambassadors to drive our mission forward?

<b>"Give or Get" Commitment</b>	<b>Propose a Board Giving Policy:</b> <ul style="list-style-type: none"><li>• Require each board member to commit to an annual "give or get" fundraising goal</li><li>• Allow flexibility in how this goal is achieved, such as through personal contributions, securing sponsorships, hosting fundraising events, or introducing new donors.</li><li>• Recognize and celebrate board members who exceed their commitments to inspire and reinforce participation.</li></ul>
<b>Metrics and Accountability</b>	Introduce <b>Quarterly Fundraising Scorecards</b> to track each board member's progress against their fundraising goals. <ul style="list-style-type: none"><li>• Hold regular check-ins with board members to discuss challenges, celebrate successes, and offer support in meeting their commitments.</li><li>• Tie fundraising contributions into annual board evaluations to underscore the importance of their role in advancing Navigator Schools' mission.</li></ul>
<b>Recognition and Motivation</b>	<ul style="list-style-type: none"><li>• Create a <b>Board Support Leadership Circle</b> to spotlight and reward members who excel in fundraising support.</li><li>• Offer opportunities for members to share success stories during board meetings to foster collaboration and best practice sharing.</li></ul>
<b>Deepening Board-Donor Relationships</b>	<ul style="list-style-type: none"><li>• Host exclusive donor appreciation events where board members can deepen connections with key donors.</li><li>• Pair board members with donors who share similar interests for personalized stewardship efforts.</li></ul>

# Thank You!



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