



Navigator Schools

Development Committee Meeting

Date and Time

Thursday September 18, 2025 at 4:00 PM PDT

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.

Join Zoom Meeting

<https://navigatorschools.zoom.us/j/96250192906>

Meeting ID: 962 5019 2906

Passcode: 733356

Agenda

	Purpose	Presenter	Time
I. Opening Items			4:00 PM
A. Call the Meeting to Order		Chuck Daggs	1 m

	Purpose	Presenter	Time
Chuck Daggs, Committee Chair, will call the meeting to order.			
B. Record Attendance & Guests	Vote	Chuck Daggs	1 m
The Committee Chair will identify guests and hold a roll-call vote to take attendance.			
C. Approve Minutes from Prior Meeting	Approve Minutes	Chuck Daggs	1 m
Committee members will participate in a roll-call vote on the approval of prior minutes.			
Approve minutes for Development Committee Meeting on April 24, 2025			
D. Public Comments		Chuck Daggs	3 m
The Committee Chair will review requests for public comments (if any).			
E. Thoughts and Updates from the Committee Chair		Chuck Daggs	3 m
The Committee Chair will offer general thoughts and updates concerning the Development Committee.			
F. Opening Comments from the Development Officer		Shun Dorsey	3 m
Shun Dorsey, Development Officer of Navigator Schools, will provide brief general opening comments and an overview concerning the items on the Committee agenda.			
II. Development			4:12 PM
A. Fundraising Policy	Vote	Shun Dorsey	15 m
Shun Dorsey, Development Officer of Navigator Schools, will present the Fundraising Policy to the Committee and will ask for a vote recommending the policy for approval to the Governance Committee.			
B. Development Snapshot: Progress to Date	FYI	Shun Dorsey	15 m
Shun Dorsey, Development Officer of Navigator Schools, will provide the Committee with year-to-date highlights and progress against Navigator's fundraising goal.			
C. Strategic Fundraising Targets for Fiscal Year 2025-26	FYI	Shun Dorsey	15 m
Shun Dorsey, Development Officer of Navigator Schools, will highlight Navigator Schools' segmented fundraising targets for fiscal year 2025-26.			

	Purpose	Presenter	Time
D. Grants Calendar, Fundraising Strategies, and Pipeline Update Shun Dorsey, Development Officer of Navigator Schools, will lead the Committee in a discussion concerning the following: 1. Donor Cultivation Events 2. Digital Giving Strategy 3. School Expansion Strategy	Discuss	Shun Dorsey	15 m
E. Board Engagement and Stewardship Plan Shun Dorsey, Development Officer of Navigator Schools, will lead the Committee in a discussion concerning Navigator Schools' shift from "Askers" to "Advocates and Openers."	Discuss	Shun Dorsey	15 m
III. Closing Items			5:27 PM
A. Confirm Next Committee Meeting The Committee will discuss and confirm the date and time of its next meeting.	Discuss	Chuck Daggs	2 m
B. Adjourn Meeting Members will vote on the approval of meeting adjournment.	Vote	Chuck Daggs	1 m

Coversheet

Approve Minutes from Prior Meeting

Section:	I. Opening Items
Item:	C. Approve Minutes from Prior Meeting
Purpose:	Approve Minutes
Submitted by:	
Related Material:	Minutes for Development Committee Meeting on April 24, 2025

DRAFT



Navigator Schools

Minutes

Development Committee Meeting

Date and Time

Thursday April 24, 2025 at 4:00 PM

Location

Laura Marco is inviting you to a scheduled Zoom meeting.

Topic: Development Committee Meeting

Time: Apr 24, 2025 04:00 PM Pacific Time (US and Canada)

Join Zoom Meeting

<https://navigatorschools.zoom.us/j/96123797331?pwd=SdiaXPuAi4NeHio4fD2PRqtMXOrYUw.1>

Meeting ID: 961 2379 7331

Passcode: 099013

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

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Join Zoom Meeting

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One tap mobile

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Dial by your location

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- +1 253 215 8782 US (Tacoma)
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- +1 669 900 6833 US (San Jose)

Find your local number: <https://navigatorschools.zoom.us/j/96123797331?pwd=OW90MTNjZW50aDZkdz09>

Committee Members Present

Chuck Daggs (remote), Niña Rosete (remote)

Committee Members Absent

None

Guests Present

Caprice Young (remote), Kirsten Carr (remote), Shun Dorsey (remote), Tom Peraic (remote)

I. Opening Items

A. Call the Meeting to Order

Chuck Daggs called a meeting of the Development Committee of Navigator Schools to order on Thursday Apr 24, 2025 at 4:04 PM.

B. Record Attendance & Guests

C. Approve Minutes from Prior Meeting

Chuck Daggs made a motion to approve the minutes from Development Committee Meeting on 01-17-25.

Niña Rosete seconded the motion.

The committee **VOTED** unanimously to approve the motion.

D. Committee Chair Update

The Committee Chair made brief introductory comments.

E. Recap of Goals & Assignments

Shun Dorsey, Staff Lead and Development Officer of Navigator Schools, reviewed action items from the last committee meeting.

F. Public Comments

There was no public comment.

II. Development

A. Dashboard and Metrics Update

Shun Dorsey, Staff Lead and Development Officer of Navigator Schools, presented the Dashboard metrics to the Committee which provided input.

B. Committee Review and Approval of the 2025-26 Fundraising Goals

Niña Rosete made a motion to approve the 2025-26 fundraising goals.

Chuck Daggs seconded the motion.

The committee **VOTED** unanimously to approve the motion.

C. Board Engagement

Shun Dorsey, Staff Lead and Development Officer of Navigator Schools, presented the Funding Playbook which the Committee reviewed and comment upon.

D. Navigator Scholars Enrichment Fund (NSEF) Development Update

Shun Dorsey, Staff Lead and Development Officer of Navigator Schools, provided an update on the NSEF development work and engaged the Committee in a discussion of the development of an NSEF Advisory Board.

III. Closing Items

A. Adjourn Meeting

There being no further business to be transacted, and upon motion duly made, seconded and approved, the meeting was adjourned at 5:00 PM.

Respectfully Submitted,
Chuck Daggs

Documents used during the meeting

- Dev Committee_2025 Year in Review.pdf
- Navigator Schools Impact Report 2024.pdf
- Board Fundraising Dashboard.pdf
- Board Elevator Pitch Worksheet.pdf
- Board Advocacy Playbook.pdf

Coversheet

Fundraising Policy

Section:	II. Development
Item:	A. Fundraising Policy
Purpose:	Vote
Submitted by:	
Related Material:	Navigator Schools Fundraising Policy (09.18.25).pdf

Navigator Schools Fundraising Policy

Purpose

The purpose of this policy is to establish clear guidelines for all fundraising activities at Navigator Schools, including both network-wide initiatives and school site-specific efforts. This policy governs the solicitation of donations from individuals, corporations, foundations, and other entities, the pursuit of grants and sponsorships, and ensures that fundraising aligns with the mission, values, and strategic priorities of Navigator Schools. Transparency, ethical conduct, and legal compliance are fundamental principles guiding all fundraising efforts.

1. Scope of Fundraising Activities

This policy applies to all fundraising activities across Navigator Schools, including:

- Grant Applications (federal, state, foundation, and corporate)
- Individual Donor Solicitations (one-time and recurring)
- Corporate Sponsorships and Partnerships
- Fundraising Events (galas, luncheons, golf tournaments)
- Online Fundraising (donation pages, crowdfunding)
- Matching Gifts (corporate matching programs)
- In-Kind Donations (goods, services, time)
- School Site-Specific Fundraising (PTOs, student groups, staff-led efforts)

All fundraising activities must align with Navigator Schools' mission, vision, and strategic goals, and comply with both network-wide and site-specific policies.

2. Governance and Oversight

2.1 Board of Directors

The Board of Directors plays a critical role in the fundraising activities of Navigator Schools. Their responsibilities include oversight of those activities and providing basic strategic direction. Fundraising activities shall also be conducted by and through the Navigator Schools' Support Corporation, whose board is appointed by the Navigator Schools' Board of Directors. The Board of Directors ensures that all fundraising efforts remain aligned with the school's mission and ethical standards.

Key responsibilities of the Board in the fundraising process include:

2.1.1 Approving Annual Fundraising Goals

Each year, the Board will review and approve the overall fundraising strategy and financial targets. This includes setting specific revenue goals that reflect the needs of the

organization, such as funding for academic programs, facilities, and special projects. The Board ensures that these goals are ambitious but achievable, and that they align with Navigator Schools' strategic objectives. By approving the goals, the Board takes ownership of the fundraising agenda and holds the organization accountable for meeting financial targets.

2.1.2 Establishing Board Fundraising Expectations

The Board sets guidelines regarding the financial contribution each member is expected to make or raise annually. This ensures that the Board leads by example, demonstrating their commitment to the school's mission. Expectations may include personal contributions, as well as leveraging personal and professional networks to secure donations, sponsorships, or partnerships. By participating actively in fundraising, Board members enhance their credibility when asking others to give and foster a culture of philanthropy within the organization.

2.1.3 Providing Strategic Oversight

The Board oversees the creation and implementation of fundraising strategies by working closely with the Development Office. They ensure that these strategies are aligned with the school's broader goals, such as expanding academic programs, enhancing student support services, or improving facilities. The Board also monitors the progress of fundraising initiatives and provides feedback or guidance when necessary. Regular reports from the Development Office enable the Board to assess performance and make adjustments to strategies to meet targets effectively.

2.1.4 Leveraging Personal and Professional Networks

Board members play an essential role in fundraising by leveraging their personal and professional connections. This involves identifying potential donors, corporate sponsors, and philanthropic foundations that share the values of Navigator Schools. The Board may introduce key stakeholders to the Development Team, host donor cultivation events, or personally solicit donations from high-net-worth individuals and businesses. By utilizing their networks, the Board helps open doors to new funding opportunities that may not be accessible otherwise.

2.1.5 Ensuring Compliance and Accountability

The Board ensures that all fundraising activities comply with applicable laws and regulations, including IRS guidelines, state fundraising laws, and nonprofit governance standards. They are responsible for overseeing financial accountability in the handling of donations, ensuring that all funds are used for their intended purposes. The Board will also review audits and financial reports related to fundraising to confirm that proper procedures are in place for tracking contributions, managing restricted funds, and reporting to donors.

2.1.6 Supporting the Development Office

While the Development Office manages the day-to-day operations of fundraising, the Board provides critical support and guidance. Board members may assist in refining fundraising strategies, identifying key priorities for funding, or offering mentorship to staff involved in development efforts. This partnership between the Board and the Development Office ensures that fundraising initiatives are aligned with the strategic vision of Navigator Schools, while also benefiting from the Board's collective expertise and experience.

2.2 Development Office

The Development Office plays a central role in the planning, execution, and management of all fundraising efforts at Navigator Schools. It is the operational arm responsible for turning the fundraising goals approved by the Board of Directors into actionable strategies. The Development Office is tasked with building and nurturing relationships with donors, managing grants, ensuring compliance with legal and regulatory requirements, and reporting on the success of fundraising initiatives. Its efforts are integral to ensuring that Navigator Schools has the financial resources necessary to support its mission of providing high-quality education.

Key responsibilities of the Development Office include:

2.2.1 Developing and Executing Fundraising Strategies

The Development Office is responsible for creating comprehensive fundraising strategies that align with the school's mission, strategic goals, and approved financial targets. These strategies cover various fundraising channels, including grant applications, individual donor campaigns, corporate sponsorships, events, and online giving. The office must be agile in its approach, adapting to emerging opportunities such as new grant programs or shifts in donor behavior. The Development Office ensures that each fundraising effort, whether large or small, is carefully planned, with measurable objectives and timelines.

In developing these strategies, the Development Office collaborates with other departments, such as academic leadership and finance, to understand the school's immediate and long-term needs. This ensures that fundraising efforts directly support the priorities of the organization, such as expanding educational programs, securing resources for underserved students, or funding new technology initiatives.

2.2.2 Donor Stewardship and Relationship Building

One of the most critical roles of the Development Office is to build and maintain strong, long-term relationships with donors. Stewardship involves more than just securing a one-time gift—it is about fostering a connection with donors that encourages continued and increased support over time. This includes:

- **Personalized Communication:** Sending tailored messages and updates to donors about how their contributions are making a difference.
- **Acknowledgements:** Ensuring that all donations, regardless of size, are acknowledged promptly through personalized thank-you letters, receipts, or calls.
- **Recognition:** Providing appropriate recognition for donors through events, newsletters, or reports, unless anonymity is requested.
- **Engagement Opportunities:** Offering donors opportunities to engage with Navigator Schools through school tours, volunteer opportunities, and special events that allow them to see the impact of their contributions firsthand.

By focusing on relationship-building, the Development Office increases donor loyalty and lifetime value, making it more likely that donors will continue to give and support the school's mission.

2.2.3 Managing Grant Applications and Compliance

The Development Office oversees the identification, application, and management of grants from government agencies, foundations, and corporations. This includes researching opportunities for funding that align with the school's priorities, such as academic enrichment, community development, or technology integration. Once potential grants are identified, the Development Office is responsible for drafting compelling applications that demonstrate the need for funding and how it will be used to advance the school's mission.

After securing grants, the Development Office ensures that Navigator Schools adheres to all the conditions specified by the grantor, including timelines for spending, reporting requirements, and outcome measurements. Proper grant management is critical for maintaining eligibility for future funding and ensuring transparency and accountability in the use of funds.

2.2.4 Maintaining Accurate Records and Reporting

Accurate recordkeeping is vital to effective fundraising management. The Development Office maintains a detailed database that tracks all donor interactions, contributions, and communications. This database allows the office to segment donors for targeted campaigns, track the success of fundraising efforts, and ensure proper acknowledgment and stewardship.

In addition to managing the donor database, the Development Office is responsible for producing regular fundraising reports for the Board of Directors and leadership team. These reports provide updates on fundraising progress, highlight key successes, and identify areas for improvement. Reporting also ensures that Navigator Schools remains accountable to its donors, providing transparency about how funds are used to advance educational programs and services.

2.2.5 Ensuring Compliance with Legal and Regulatory Requirements

Fundraising activities at Navigator Schools must comply with a range of local, state, and federal laws, including IRS regulations governing charitable donations. The Development Office is

responsible for ensuring that all fundraising practices adhere to these laws, protecting the organization's tax-exempt status and maintaining its reputation for ethical conduct.

Key compliance responsibilities include:

- **Tax Receipts:** Issuing appropriate tax receipts for all donations in a timely manner, ensuring donors can claim deductions where applicable.
- **Grant Compliance:** Ensuring that all grants are used in accordance with the stipulations of the grantor, including any reporting obligations.
- **Nonprofit Fundraising Laws:** Adhering to state laws regarding fundraising, such as registration requirements for charitable solicitations.

By maintaining strict compliance with legal and ethical standards, the Development Office protects Navigator Schools from legal risks and ensures the integrity of its fundraising efforts.

2.2.6 Regular Reporting to the Board of Directors

The Development Office regularly reports fundraising performance to the Board of Directors. These reports provide detailed insights into the progress of fundraising initiatives, donor engagement, grant applications, and financial outcomes. Key metrics reported to the Board may include total funds raised, donor retention rates, grant success rates, and the performance of specific campaigns.

This transparent reporting process allows the Board to monitor progress towards fundraising goals, make data-driven decisions, and provide strategic guidance where needed. It also ensures that the Board remains informed about the financial health of the organization and the effectiveness of its fundraising strategies.

2.2.7 Collaborating with School Site Leaders for Local Fundraising

In addition to managing network-wide initiatives, the Development Office works closely with school site leaders to support fundraising efforts at individual campuses. This collaboration ensures that school-specific fundraising aligns with Navigator Schools' overall mission, values, and legal standards. The Development Office provides guidance on best practices, helps develop fundraising strategies tailored to the local context, and oversees compliance with branding and reporting requirements.

2.3 School Site Oversight

School site-level fundraising plays a vital role in supporting the specific needs of individual campuses within the Navigator Schools network. While the Development Office and the Board of Directors oversee and guide large-scale, organization-wide fundraising efforts, school sites also have the opportunity to engage in localized fundraising initiatives. These initiatives can include events, student group activities, Parent-Teacher Organization (PTO) campaigns, and faculty- or staff-led efforts. However, to ensure consistency, transparency, and alignment with Navigator Schools' mission and policies, school site fundraising requires careful oversight.

2.3.1 Role of the School Principal

The School Principal is the primary authority at each school site responsible for overseeing all local fundraising activities. The Principal ensures that every fundraising initiative aligns with the overall mission of Navigator Schools, adheres to ethical and legal standards, and supports the school's educational goals. Specifically, the Principal:

Approves Fundraising Proposals: All fundraising activities at a school site must be submitted to the Principal for approval using a standardized **Fundraising Request Form**. This form includes details such as the purpose of the fundraiser, the target fundraising amount, and how the funds will be used. The Principal ensures that these proposals align with the school's mission and that they are in compliance with policies set forth by the Development Office and the Board of Directors.

Ensures Legal and Ethical Compliance: The Principal is responsible for ensuring that all fundraising activities comply with local, state, and federal laws, including tax regulations, gambling laws, and nonprofit fundraising standards. The Principal works closely with the Director of Compliance to prevent any activities that could expose the school to legal risks, such as unauthorized raffles or games of chance that violate state gambling laws.

Coordinates with the Development Office: The Principal acts as a liaison between the school site and the Development Office to ensure that all fundraising efforts are coordinated. This collaboration is critical in maintaining consistency in messaging, brand usage, and donor engagement across the organization.

2.3.2 Collaboration with the Director of Compliance

The Director of Compliance plays a key role in school site fundraising oversight, working in tandem with the School Principal to ensure that fundraising activities comply with legal, ethical, and organizational standards. The Director of Compliance:

Reviews External Partnerships: When school sites engage with external vendors or partners for fundraising events, the Director of Compliance must approve these relationships to ensure that they align with Navigator Schools' values and legal requirements. This includes reviewing contracts, agreements, and potential conflicts of interest.

Monitors Compliance with Fundraising Laws: The Director of Compliance ensures that all school site fundraising activities follow state and federal fundraising regulations, such as registration requirements for charitable solicitations, raffle or gaming laws, and tax reporting obligations. The Director provides guidance to school leaders to prevent any legal missteps.

Assesses Potential Risks: In coordination with the School Principal, the Director of Compliance assesses the risks associated with specific fundraising activities, such as

liability issues for on-campus events or vendor disputes, and ensures that the school is adequately protected.

2.3.3 Coordination with the Development Office

While school sites have the flexibility to conduct their own fundraising activities, these efforts must align with the broader fundraising strategies of Navigator Schools. The Development Office provides ongoing support to school sites, offering guidance, resources, and best practices. Key areas of coordination include:

Fundraising Strategy Development: The Development Office works with school site leaders to develop tailored fundraising strategies that meet local needs while aligning with network-wide objectives. This includes advising on potential donor outreach, grant opportunities, and event planning.

Branding and Communication: All fundraising materials, including flyers, social media posts, emails, and promotional content, must adhere to Navigator Schools' branding guidelines. The Development Office ensures that school sites are using approved logos, messaging, and templates to maintain consistency and protect the school's brand identity.

Donor Stewardship and Reporting: To ensure a cohesive donor stewardship experience, the Development Office helps school sites manage donor relations by providing templates for acknowledgment letters, ensuring timely recognition, and maintaining donor records. All donor interactions, including contributions made at the school site level, are tracked within the network's central donor database to ensure transparency and proper communication.

2.3.4 Fundraising Approval Process

The process for approving fundraising activities at school sites is designed to ensure that all efforts are aligned with Navigator Schools' mission and legal standards. The approval process involves several key steps:

Submission of Fundraising Requests: Any school site planning a fundraiser must submit a **Fundraising Request Form** at least 30 days before the planned event or campaign. This form requires detailed information about the fundraiser, including:

1. Purpose of the fundraiser
2. Target fundraising amount
3. Intended use of the funds
4. Event or campaign details (e.g., date, location, participants)
5. Revenue sources (e.g., ticket sales, donations, sponsorships)
6. Projected expenses
7. Compliance with branding guidelines

Review by the Principal: The School Principal reviews each request to ensure it aligns with the school's educational goals and mission, adheres to legal and ethical standards, and is in line with the network's fundraising policies.

Consultation with the Director of Compliance and Development Office: For larger or more complex fundraising activities, the Principal consults with the Director of Compliance and the Development Office to ensure that all legal requirements are met and that the fundraiser is integrated into the broader fundraising strategy. This step is particularly important for fundraising events that involve external vendors or corporate sponsorships.

Final Approval: Once all reviews are complete, the School Principal or designated authority provides final approval or denial of the fundraising request within 10 business days. If approved, the school site may proceed with planning and execution.

2.3.5 Financial Oversight and Reporting

To ensure accountability and transparency, school site leaders must maintain accurate financial records for all fundraising activities. This involves:

Tracking Revenues and Expenses: School sites are responsible for documenting all income and expenditures related to fundraising activities. This includes tracking ticket sales, donations, sponsorships, and event costs.

Fundraising Reports: A **Fundraising Report** must be submitted to the Development Office and Finance Department within 30 days of the completion of a fundraiser. The report should include total revenue, total expenses, net profit, and details of any restricted funds.

Annual Fundraising Audits: Each school site participates in an annual fundraising audit conducted by the Navigator Schools Finance Department. This audit ensures compliance with school-wide financial policies and verifies the appropriate use of funds.

2.3.6 Ensuring Equitable Participation

Navigator Schools is committed to ensuring that all students and families can participate in fundraising events, regardless of financial circumstances. School site leaders must ensure that:

No Pressure to Participate: Participation in fundraising activities is voluntary, and students, families, and staff are not pressured or coerced into contributing.

Inclusive Participation: Fundraisers that involve fees, such as ticket sales, must provide opportunities for students and families who are unable to afford the cost. This could include offering scholarships, reduced prices, or alternative ways to contribute.

3. Ethical Standards

Navigator Schools is committed to maintaining the highest ethical standards in all fundraising activities. This commitment ensures that all donor interactions are transparent, respectful, and aligned with the school's values. The following key principles guide our fundraising efforts:

3.1 Transparency

Transparency is essential in fostering trust and credibility with our donors. Navigator Schools ensures that donors receive clear, accurate information about how their contributions will be used. This principle involves several important actions:

3.1.1 Clear Communication

All fundraising campaigns and donor communications must include clear and concise information about the specific goals and intended use of funds. Whether in materials, presentations, or outreach, the Development Office is responsible for ensuring that the message is transparent and comprehensible.

3.1.2 Accessible Reporting

Navigator Schools will provide periodic reports or updates to donors, outlining how funds have been utilized and the impact they have made. This could include updates through newsletters, annual reports, or specific project impact statements that give donors a clear picture of how their contributions are making a difference.

3.1.3 Open Financial Practices

The Development Office will maintain accurate, accessible records of all funds raised, and these records will be available to donors upon request. This ensures accountability and reinforces the trust that donors place in the organization.

3.2 Confidentiality

Maintaining the confidentiality of donor information is a fundamental ethical responsibility. Navigator Schools ensures that all donor data, including contact information, donation history, and personal preferences, is kept private and secure. The following practices ensure the highest standard of confidentiality:

3.2.1 Data Protection

Donor information is stored securely in accordance with data privacy laws and regulations. The Development Office is responsible for safeguarding this data, and access is restricted to authorized personnel only, ensuring no unauthorized disclosure or use of private information.

3.2.2 Use of Information

Donor information is used solely for the purposes of fulfilling donations, managing relationships, and complying with legal obligations. It will not be shared with or sold to any third parties without the explicit consent of the donor, ensuring the privacy of their personal data is upheld.

3.2.3 Anonymity Options

Donors have the option to remain anonymous. If a donor wishes, their identity and the amount of their donation will not be disclosed in public acknowledgments, reports, or materials. This ensures that their privacy preferences are respected and adhered to in all aspects of donor communication.

3.3 Donor Rights

Navigator Schools acknowledges and upholds the rights of all donors. These rights are designed to ensure a respectful, ethical, and transparent relationship between the organization and its supporters:

3.3.1 Right to Information

Donors have the right to know how their contributions will be used and to receive updates on the impact their donations have made. This includes being informed about the specific programs or initiatives that their funds are supporting and receiving detailed reports about the outcomes of those programs.

3.3.2 Right to Recognition

Donors have the right to be recognized for their contributions, except when anonymity is requested. Navigator Schools will ensure that donors are appropriately acknowledged for their generosity, in line with their preferences. Recognition can be in the form of thank-you letters, public acknowledgments, or other forms of appreciation as determined by the donor's preference.

3.3.3 Right to Choose Participation

Donors have the right to choose how they want to participate in fundraising efforts. This includes deciding whether they wish to be involved in special events, campaigns, or opportunities for giving. Navigator Schools respects a donor's choice to engage or remain uninvolved in any particular initiative.

3.4 Non-Coercive Fundraising

Navigator Schools is committed to conducting fundraising activities in a respectful, non-coercive manner. This principle ensures that fundraising efforts do not exert undue pressure on potential donors or create a sense of obligation. It reflects the school's values of respect and integrity:

3.4.1 Respectful Fundraising

Fundraising activities will be conducted in a manner that upholds the dignity and autonomy of potential donors. The Development Office will ensure that fundraising materials, approaches, and events do not pressure, manipulate, or guilt donors into giving.

3.4.2 Voluntary Participation

Donors will always be made aware that their participation is voluntary, and they are free to decline any request for a donation without consequence. The aim is to create a positive experience for donors, where giving is an act of generosity and choice, not obligation.

4. Fundraising Strategies

Navigator Schools employs a diverse and strategic approach to fundraising to support its mission and meet its financial needs. The following strategies outline key areas for growth, engagement, and long-term sustainability.

4.1 Grants

Grants are a vital source of funding for Navigator Schools, especially for initiatives that align with the organizations mission of supporting student success and community development. The following areas are prioritized when seeking grant opportunities:

4.1.1 Priority Areas

Navigator Schools prioritizes grants that align with its focus on student support, Multi-Language Learners (MLL), academic recovery, and community development. This includes grants that directly support academic programs, social services, extracurricular activities, and partnerships that benefit students and their families.

4.1.2 Types of Grants

Navigator Schools seeks grants from various sources, including federal, state, foundation, and corporate funders. Each type of grant has its own eligibility requirements and application processes:

- **Federal Grants:** Funding provided by government agencies to support educational programs and services.
- **State Grants:** Localized funding from state-level programs aimed at educational improvement and community enrichment.
- **Foundation Grants:** Philanthropic organizations that provide grants based on specific interests or community needs, often related to educational support, Multi-Language Learners, and academic recovery.
- **Corporate Grants:** Contributions from businesses that support educational programs or community development efforts that align with their corporate social responsibility (CSR) initiatives.

4.2 Individual Donors

Individual donors are a cornerstone of Navigator Schools' fundraising strategy. By building and maintaining relationships with donors, the organization ensures sustainable funding through both one-time and recurring contributions. The following strategies help to engage individual donors:

4.2.1 Annual Campaigns

Navigator Schools conducts annual campaigns, such as year-end drives, to engage current and potential donors. These campaigns typically highlight the impact of donations on the school

community, encouraging donors to contribute annually. The Development Office ensures that these campaigns are well-planned, impactful, and executed with clear communication and transparent reporting on the use of funds.

4.2.2 Donor Levels

To recognize and appreciate the generosity of individual donors, Navigator Schools establishes donor recognition tiers. These tiers provide various levels of acknowledgment, ensuring that donors feel valued for their contributions, regardless of the amount. Tiers may include bronze, silver, gold, and platinum levels, with each offering different benefits and recognition opportunities.

4.2.3 Recurring Donations

To establish a sustainable funding stream, Navigator Schools encourages monthly donations through a recurring giving program. This approach provides donors with an easy, consistent way to contribute to the Navigator's mission. The Development Office will ensure that the recurring donation process is simple, with clear communication about how monthly contributions will be used and the impact they have.

4.3 Corporate Sponsorships

Corporate partnerships are essential for generating support for Navigator Schools, particularly through sponsorships for events and specific projects. These collaborations not only provide financial support but also help to build relationships with businesses that share similar values.

4.3.1 Partnerships

Navigator Schools seeks corporate partners whose values align with the organizations mission of fostering academic excellence, supporting Multi-Language Learners, and community development. These partnerships often involve both financial contributions and collaborative efforts to support shared initiatives. By partnering with corporations, Navigator Schools can access additional resources, expertise, and visibility.

4.3.2 Matching Gifts

To maximize contributions from individual donors, Navigator Schools will leverage employee matching gift programs. Many corporations offer matching gift programs that allow employees to double or even triple the amount of their personal donations. The Development Office will actively promote these opportunities and work with corporate partners to ensure that matching gifts are properly processed and tracked.

4.4 Fundraising Events

Fundraising events are an important component of Navigator Schools' strategy to engage the community, raise awareness, and generate support. These events provide opportunities for donors to connect with the school and each other while contributing to the school's funding goals.

4.4.1 Annual Events

Navigator Schools will host major community events, such as galas, golf tournaments, and other fundraising activities, to bring together supporters and raise funds for specific initiatives. These events are designed to be enjoyable and impactful, providing a platform for the organization to showcase its work, celebrate achievements, and connect with potential donors. The Development Office ensures that these events are well-organized and align with the Navigator's fundraising goals.

4.4.2 Sponsorships

To fund these events, Navigator Schools will secure sponsorships from businesses and organizations. Sponsorships provide businesses with the opportunity to align their brand with a reputable educational institution, gain visibility, and contribute to a meaningful cause. The Development Office will work to identify potential sponsors and offer various sponsorship packages with clear benefits, such as branding and promotional opportunities.

4.5 Online Fundraising

Online fundraising has become a crucial method for reaching a wide audience and allowing donors to give easily and securely. Navigator Schools maintains an active online fundraising presence to expand its donor base and facilitate ongoing contributions.

4.5.1 Donation Platforms

Navigator Schools ensures that its online donation pages are secure, user-friendly, and easily accessible. These platforms allow donors to make one-time or recurring contributions online, using credit cards or other payment methods. The Development Office continuously monitors and updates these platforms to ensure they provide a seamless giving experience for donors.

4.5.2 Crowdfunding

In addition to traditional online donations, Navigator Schools explores crowdfunding campaigns for targeted projects. Crowdfunding allows the school to reach a broader audience, particularly for specific initiatives or urgent needs. The Development Office coordinates these campaigns, ensuring they are compelling, transparent, and well-publicized to maximize contributions from a wide range of supporters.

5. Donor Stewardship

Navigator Schools is committed to fostering and maintaining meaningful, long-term relationships with donors through a thoughtful stewardship process. Donor stewardship is the backbone of the organization's fundraising efforts, ensuring that every donor feels valued, informed, and connected to the school's mission and impact.

5.1 Acknowledgment

5.1.1 Prompt and Personalized Communication

Navigator Schools ensures that all donations are promptly acknowledged through personalized

thank-you letters. These acknowledgments not only express gratitude but also demonstrate how the donor's contribution directly supports the organization's mission and goals.

5.1.2 Reinforcement of Donor Impact

Acknowledgment communications emphasize the role of donors in enabling student success, fostering a sense of partnership between Navigator Schools and its contributors.

5.2 Impact Reporting

5.2.1 Transparent Use of Contributions

Navigator Schools provides detailed updates to donors, outlining how their contributions have been utilized. These updates are delivered through written reports, newsletters, and other communications, ensuring complete transparency.

5.2.2 Demonstration of Tangible Outcomes

Impact reports highlight measurable outcomes, such as improved academic performance, enhanced student resources, or expanded programs, to illustrate the transformative power of donor support.

5.3 Recognition

5.3.1 Public Acknowledgment of Donors

Navigator Schools publicly recognizes donors through various channels, including annual reports, newsletters, events, and the organization's website. This recognition serves to honor donor generosity and encourage community support.

5.3.2 Respect for Donor Preferences

Navigator Schools ensures that donors who request anonymity are fully respected. This includes removing their names from public acknowledgments while still providing private updates on the impact of their contributions.

5.4 Donor Engagement

5.4.1 Appreciation Events

Navigator Schools organizes exclusive appreciation events, such as donor receptions and campus tours, to celebrate donor contributions and foster deeper relationships.

5.4.2 Program Updates and Involvement Opportunities

Donors are kept informed through program updates and are invited to engage with Navigator Schools' mission by attending events, volunteering, or participating in special initiatives that align with their interests.

6. Site-Specific Fundraising Guidelines

Navigator Schools recognizes the importance of site-specific fundraising in addressing the unique needs of individual campuses. However, to ensure consistency, compliance, and alignment with organizational goals, all site-level fundraising activities must adhere to structured guidelines. These processes aim to create transparency, accountability, and collaboration between school sites and the central Development and Finance teams.

6.1 Approval and Compliance

6.1.1 Fundraising Approval Process

To maintain oversight and alignment with Navigator Schools' mission, all site-level fundraising activities must be approved by the School Principal and coordinated with the central Development Office.

- **Fundraising Request Forms:** School sites must submit a standardized Fundraising Request Form at least 30 days in advance. This form should outline the purpose of the fundraiser, target revenue, proposed use of funds, and estimated expenses.
- **Pre-Approval by Development and Finance:** To prevent non-compliance or duplication of efforts, all proposals must also receive clearance from the Development Office and CFO, ensuring they meet branding, communication, and legal standards.

6.1.2 Compliance with Organizational Standards

All fundraising activities must adhere to the following organizational requirements:

- **Branding and Communication:** Fundraisers must use approved branding materials, messaging, and templates provided by the Development Office to ensure consistency across all sites.
- **Legal and Regulatory Standards:** All activities must comply with state and federal laws, including tax reporting, charitable solicitation regulations, and nonprofit fundraising standards. Unauthorized raffles or gaming activities are strictly prohibited.

6.2 Use of Funds

6.2.1 Designated Use of Funds

Funds raised at school sites must be used to directly support programs, services, or student enrichment activities that align with Navigator Schools' mission and strategic priorities.

6.2.2 Restricted and Unrestricted Funds

To ensure clarity in financial planning and reporting:

- **Restricted Funds:** These are funds raised for specific purposes (e.g., science camp, new technology) and must be used exclusively for their designated purpose.
- **Unrestricted Funds:** These funds may be used for broader school needs, as determined by the Principal in consultation with the Development Office and CFO.

6.3 Reporting and Accountability

6.3.1 Financial Record Maintenance

School sites must maintain accurate and detailed financial records for all fundraising activities, including revenue, expenses, and net profits. These records will be subject to periodic review by the central Finance team to ensure transparency and accountability.

6.3.2 Post-Fundraiser Reporting

To establish accountability and identify best practices:

- **Fundraising Reports:** School sites must submit a comprehensive Fundraising Report within 30 days after each event. This report should include a breakdown of income, expenses, and net profits, as well as an evaluation of the fundraiser's success.
- **Centralized Record-Keeping:** The Development Office will maintain a centralized database of all site-specific fundraising activities, allowing for better oversight and strategic planning.

6.4 Central Oversight and Support

To mitigate the challenges of decentralized fundraising efforts, Navigator Schools is implementing increased oversight and support for site-specific initiatives. This includes:

- **Training for Principals and School Staff:** The Development Office will provide training on fundraising policies, financial tracking, and donor stewardship to empower school leaders while maintaining organizational consistency.
- **Coordinated Fundraising Calendar:** The Development Office will establish a shared fundraising calendar to prevent overlapping campaigns and optimize donor engagement across all campuses.
- **Support Resources:** School sites will receive access to fundraising templates, branding materials, and guidance from the central Development and Finance teams to streamline efforts and ensure compliance.

7. Legal and Compliance

Navigator Schools is committed to ensuring all fundraising activities adhere to legal and ethical standards, including compliance with federal, state, and local regulations. These guidelines serve to protect Navigator Schools' integrity, ensure accountability, and build trust with donors and stakeholders.

7.1 California State Laws and Compliance Requirements

7.1.1 Charitable Solicitation Laws

In California, organizations soliciting donations must register annually with the California Attorney General's Registry of Charitable Trusts.

- **Requirements:** Navigator Schools, as an educational institution, is exempt from registration; however, the Navigator Schools Support Corporation must register and renew annually.
- **Compliance:** After consultation with outside counsel, the Navigator Schools Support Corporation has confirmed its registration and is in good standing.

7.1.2 Professional Fundraisers and Commercial Fundraising Contracts

Under California Government Code (Section 12580–12599.8), nonprofits contracting with professional fundraisers or consultants must file these contracts with the Attorney General's Office and adhere to fee and disclosure regulations.

- **Requirements:** Navigator Schools must file contracts with the Attorney General's Office if third-party fundraising consultants are hired.
- **Compliance:** The Development Office will ensure all contracts meet state disclosure requirements and are properly filed.

7.1.3 Crowdfunding and Online Donations

California law (SB 798) governs online fundraising platforms acting as intermediaries for nonprofits.

- **Requirements:** Navigator Schools must only use registered crowdfunding platforms that comply with disclosure rules.
- **Compliance:** The Development Office will vet all third-party platforms, ensuring compliance with state standards and informing donors about the processing and allocation of their contributions.

7.2 Federal Regulations and Compliance Requirements

7.2.1 IRS Regulations for Charitable Contributions

As a 501(c)(3) tax-exempt organization, Navigator Schools must follow IRS guidelines for acknowledging donations.

- **Requirements:** Donors contributing \$250 or more must receive written acknowledgment in accordance with IRS Publication 1771.
- **Compliance:** The Development Office will issue tax-compliant receipts for all donations, ensuring proper documentation for both Navigator Schools and its donors.

7.2.2 Grant Management and Federal Compliance

Federal grants require adherence to the Office of Management and Budget (OMB) Uniform Guidance, which governs procurement, fund usage, and reporting.

- **Requirements:** Navigator Schools must maintain proper documentation, submit timely reports, and monitor any subrecipients.
- **Compliance:** The Development Office will oversee adherence to Uniform Guidance, ensuring compliance with federal standards in all grant management activities.

7.2.3 FERPA Compliance

The Family Educational Rights and Privacy Act (FERPA) protects student data from unauthorized use in fundraising.

- **Requirements:** Any use of student data, such as images or testimonials, must have explicit parental or guardian consent.
- **Compliance:** The Development Office will ensure all fundraising materials comply with FERPA regulations, safeguarding personally identifiable information (PII).

7.3 Ethical Standards and Accountability

7.3.1 Donor Bill of Rights

Navigator Schools upholds the Donor Bill of Rights to maintain transparency, accountability, and respect for donor contributions.

- **Requirements:** Donor confidentiality must be preserved, and donors must be informed about the impact of their contributions.
- **Compliance:** The Development Office will ensure donor information is kept confidential, contributions are acknowledged promptly, and donors are regularly updated on the outcomes of their support.

7.3.2 U.S. Postal Regulations for Fundraising

If direct mail is used for fundraising, Navigator Schools must comply with U.S. Postal Service regulations, including nonprofit mailing status.

- **Requirements:** Bulk mailing and nonprofit status must align with postal guidelines.
- **Compliance:** The Development Office will handle all direct mail campaigns, ensuring compliance with bulk mailing and nonprofit requirements.

7.3.3 Corporate Sponsorships and UBIT Compliance

Unrelated Business Income Tax (UBIT) can apply if corporate sponsors receive substantial benefits beyond recognition.

- **Requirements:** Corporate sponsorship agreements must avoid activities that trigger UBIT.
- **Compliance:** The Development Office will consult with legal and tax professionals to structure agreements appropriately, ensuring compliance with federal tax laws.

7.4 Site-Specific Compliance and Reporting

7.4.1 Financial Accountability at School Sites

School sites must adhere to California's fiscal transparency laws and Navigator Schools' internal financial policies.

- **Requirements:** Accurate tracking of revenues, expenses, and fund allocation is essential for all site-level fundraising.
- **Compliance:** Principals and the Finance Department will oversee financial management, with annual audits conducted to ensure accountability.

7.4.2 Transparency and Reporting to Donors

Navigator Schools must provide clear reporting on how donations are used to ensure donor confidence and compliance with regulations.

- **Requirements:** Annual donor reports must detail how funds were allocated and the impact of contributions.

- **Compliance:** The Development Office will prepare transparent and detailed reports for all donors, ensuring alignment with California and federal requirements.

8. Policy Review and Updates

8.1 Annual Review Process

Navigator Schools is committed to maintaining fundraising policies that are relevant, effective, and aligned with its mission. The Development Office, in collaboration with the Board of Directors, will conduct an annual review of this policy to:

- **Evaluate Effectiveness:** Assess whether the policy supports Navigator Schools' fundraising goals and addresses evolving needs.
- **Incorporate Feedback:** Include input from key stakeholders, including donors, school site leaders, and the Finance Department.
- **Address Regulatory Changes:** Ensure continued compliance with federal, state, and local fundraising laws, as well as industry best practices.

8.2 Policy Update Procedures

Updates to the fundraising policy will follow a structured process to ensure thorough consideration and smooth implementation:

- **Drafting Updates:** The Development Office will propose necessary revisions based on the annual review findings.
- **Stakeholder Input:** Proposed updates will be shared with the Finance Department, school principals, and other relevant parties for feedback.
- **Board Approval:** Final policy changes will be presented to the Board of Directors for review and approval.

8.3 Communication and Implementation

To ensure transparency and adherence to the updated policy:

- **Distribution:** Revised policies will be distributed to all staff involved in fundraising, including site leaders, the Development Office, and the Finance Department.
- **Training:** Staff and site leaders will receive training on policy changes to ensure understanding and compliance.
- **Monitoring:** The Development Office will monitor adherence to the updated policy and provide ongoing support to school sites.

8.4 Continuous Improvement

Navigator Schools is dedicated to fostering a culture of continuous improvement in fundraising practices. By regularly reviewing and updating its fundraising policy, Navigator Schools ensures that its efforts remain:

- **Mission-Aligned:** Supporting the organization's vision to provide equitable education to all students.

- **Transparent:** Upholding accountability to donors, stakeholders, and the community.
- **Impact-Driven:** Maximizing resources to benefit students, programs, and services.

Coversheet

Development Snapshot: Progress to Date

Section:	II. Development
Item:	B. Development Snapshot: Progress to Date
Purpose:	FYI
Submitted by:	
Related Material:	Development Committee Strategic Planning FY25-26 (09.18.25).pptx.pdf



Development Committee Strategic Planning

FY 25–26 Goals, Tactics & Engagement

Executive Summary

The Development Committee and staff created goals for the year to achieve the overall philanthropy target of \$1.3M. This goal is organizational, with staff and the board collaborating on the action plan.

- The Board, the Development Committee, and staff aligned on a set of goals with metrics to ensure progress
- Staff has collected input from our funding partners on expectations and best practices to obtain future funding
- Navigator has established an initial pipeline of local, regional, and national foundations and corporations.
- Navigator staff has made progress towards reaching the target
- Capitalizing on the \$12M CSP grant to build momentum in Navigator's future communities
- The Board of Directors will be critical to the success of the plan and can participate in numerous ways

The Board, the Development Committee, and staff aligned on a set of goals with metrics to ensure progress

What We Committed To	What We've Done
Fundraising & Donor Strategy <ul style="list-style-type: none">- Raise \$1.3M- Launch NSEF (STEM, Wellness, Food Access)- Explore feasibility of signature fundraising event	\$35K raised to date \$500K Strong Commitment NSEF launched in Watsonville Signature event <i>deprioritized</i> per board guidance—shifted to cultivation/pipeline growth strategy
Grant Infrastructure & Management <ul style="list-style-type: none">- Strengthen compliance systems- Increase internal collaboration- Build tools and policies	Transitioning \$12M CSP grant from award → implementation Cross-functional cadence launched (Dev/Finance/Comms) Draft Fundraising Policy Handbook under review for Oct board vote
Operational Efficiency & Tools <ul style="list-style-type: none">- Launch CRM- Donor messaging system- Back-end donation process- Begin KPI dashboard and annual report build	Payment Gateway GoFundMe Pro (Classy) Activated Donation button live on site by Sept 2024-25 Annual Report planning underway CRM (HubSpot) adopted and in Q2 rollout
Donor Outreach & Pipeline Growth <ul style="list-style-type: none">- Engage businesses and chambers- Target new regional funders- Expand storytelling and Giving Tuesday	20+ local businesses segmented and contacted 11 - Foundational grant applications submitted 2 - Competitive Grants Submitted Outreach to OC funders underway Laurel Foundation \$25K Giving Tuesday match confirmed Chamber/Rotary invites and visit planning in progress Site Based Family Support Model
Board Engagement & Advocacy <ul style="list-style-type: none">- Board workshop- Clarify expectations- Use NSEF as activation tool	First-ever Board Advocacy Workshop held Board expectations tied to NSEF launched Giving Tuesday peer-to-peer templates drafted

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Navigator Schools - Development Committee Meeting - Agenda - Thursday September 18, 2025 at 4:00 PM

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- **Our fundraising infrastructure must mature** to support **replication and scale**—from internal systems (CRM, dashboards) to external storytelling and donor stewardship.
- **Philanthropic partners expect impact transparency.** We need clear, frequent, and consistent communication with current and prospective funders around **outcomes**, **student stories**, and **expansion progress**.
- **Site-based leadership matters.** Early site campaigns (like in Watsonville) showed that trusted parent and staff champions can mobilize community giving effectively—especially when tied to programs like STEM, food access, and afterschool enrichment.

Navigator has established an initial pipeline of local, regional, and national foundations and corporations.

Submitted Grants/ Foundations	Cultivation
2025–30 California Community Schools Partnership Program (CCSPP) Implementation Grant (Cohort 4)	Tier One: Stuart Foundation Monterey Peninsula Foundation Bezos Family Foundation Packard Foundation Gates Foundation San Benito Foundation Bayer Foundation
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Stupski Foundation	
Riordan Foundation	
Weingart Foundation- Revist for OC	
UNFI Foundation	
Sandia Labs/ NTESS	
McCarthy Dressman	
Spencers Foundation	
MacBeth Foundation	
Laurel Foundation	
Walter Johnson Foundation	
Reiman Foundation	



Navigator staff has made progress towards reaching the target

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Total Fundraising Goal (2025–26)	\$6,324,851
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2025-26 Funding Goals (New 2025-26 Commitments)

Funding Source	Target	% of Total Goal	Budget
Government	\$720,000	30.38%	\$475,200
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Corporate Partners	\$300,000	12.66%	\$150,000
Individuals	\$550,000	23.21%	\$165,000
Small Grants	\$50,000	2.11%	\$25,000
Local Businesses	\$100,000	4.22%	\$30,000
Events / Other	\$50,000	2.11%	\$25,000
Total	\$2,370,000	100%	\$1,295,200

* This includes funding from grants awarded prior to 2025-26 that will fund 2025-26 and a grant with a high likelihood of being awarded that will fund 2025-26.,,

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Grant Implementation Partnership	<ul style="list-style-type: none"> Serve as an internal development liaison to CSP consultant and CFO f Translate CSP compliance deliverables i Contribute to DOE reporting requirements Participate in budget tracking and documentation review
Local Fundraising & Match Activation	<ul style="list-style-type: none"> Seed and grow funder pipelines Position giving opportunities Activate hyper-local partnerships
Community Business Engagement	<ul style="list-style-type: none"> Deepen relationships with local Chambers of Commerce and Rotary Clubs Co-design and host "Navigator Launch" events Position local businesses as community sponsors
Parent Support Team Mobilization	<ul style="list-style-type: none"> Support launch and training of Family Support Teams Create and distribute plug-and-play fundraising toolkits Track and celebrate site-based campaign milestones
Visibility, Storytelling & Donor Communication	<ul style="list-style-type: none"> Lead CSP-aligned storytelling campaigns Embed new site impact stories Capture visual assets

The Board of Directors will be critical to the success of the plan and can participate in numerous ways

Ambassador & Advocate Roles	<ul style="list-style-type: none">Each board member will be assigned 1–2 roles across fundraising, visibility, or strategic partnership (based on interest, location, and network).Opportunities include:<ul style="list-style-type: none">Hosting donor tours at Navigator sitesIntroducing Navigator to foundation/corporate contactsServing as a speaker at local events or chambersParticipating in Giving Tuesday storytelling (social media, email quotes)
Quarterly Engagement Expectations	<ul style="list-style-type: none">Attend 1 donor-focused site visit or campaign activation per quarterMake a personally meaningful gift annually; participate in Giving Tuesday match (e.g., \$250+)Make 2+ strategic introductions (business, foundation, civic leaders) aligned to NSEF or expansion goals
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Activation Milestones	<ul style="list-style-type: none">Fall 2025: Giving Tuesday Campaign Participation + Laurel Match BoostWinter 2026: Board-hosted donor lunches in Gilroy and WatsonvilleSpring 2026: Site-based event invitations (STEM, Wellness, Food Pantry showcases)

Thank You!



Shun Dorsey
Development Officer
Shun.Dorsey@navigatorschools.org

Strategic Goals: FY 25–26

Road to \$1.3M	<p>Grants and Foundations target: \$950,000 (<i>Government- \$475K, Foundations- \$450K, Small Grants- \$25K</i>)</p> <ul style="list-style-type: none"> • Submit at least 12 competitive grant proposals (prioritizing multi-year and renewal opportunities) • Maintain a 40–50% award rate, securing a minimum of \$600K by January 2026.
Digital Giving	<ul style="list-style-type: none"> • Raise \$50,000+ in individual and matched giving by December 2025 through donor site, Laurel match, and Giving Tuesday.- Grow to 150 individual donors at an average gift size \$50–\$100 • Capture email and web engagement (click-throughs, donations, time on donor page) so that we have a north star for success for future campaigns <p><i>Laurel Foundation has committed a \$25K Giving Tuesday match to boost early momentum.</i></p>
Strengthen parent/ business partnerships	<ul style="list-style-type: none"> • Establish active family support teams across all sites, each leading at least one campaign or event tied to school needs. (Wellness, Food, STEM, etc.) • Invite members of the local Chambers or Rotary clubs to events on each campus (ribbon cuttings, cultural celebrations) by November with at least 40 attendees across events. <p><i>Target: 20 business gifts across tiers (\$1K–\$5K+); minimum \$30K raised- Host 4 campus-based Chamber/Rotary events (1 per site by March 2026)</i></p>
School- Based Fundraising	<ul style="list-style-type: none"> • Launch and onboard all schools to a standardized fundraising request and tracking system (integrated with CRM or shared dashboard). • 90% of site-based campaigns are tracked and reported using shared tools, including year-end summaries prepared for board and donor communications. <p><i>Goal: 2-3 site-led campaigns raising \$10K-15K each</i></p>

Coversheet

Strategic Fundraising Targets for Fiscal Year 2025-26

Section:	II. Development
Item:	C. Strategic Fundraising Targets for Fiscal Year 2025-26
Purpose:	FYI
Submitted by:	
Related Material:	Development Committee Strategic Planning FY25-26 (09.18.25).pptx.pdf



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Road to \$1.3M	<p>Grants and Foundations target: \$950,000 (<i>Government- \$475K, Foundations- \$450K, Small Grants- \$25K</i>)</p> <ul style="list-style-type: none"> • Submit at least 12 competitive grant proposals (prioritizing multi-year and renewal opportunities) • Maintain a 40–50% award rate, securing a minimum of \$600K by January 2026.
Digital Giving	<ul style="list-style-type: none"> • Raise \$50,000+ in individual and matched giving by December 2025 through donor site, Laurel match, and Giving Tuesday.- Grow to 150 individual donors at an average gift size \$50–\$100 • Capture email and web engagement (click-throughs, donations, time on donor page) so that we have a north star for success for future campaigns <p><i>Laurel Foundation has committed a \$25K Giving Tuesday match to boost early momentum.</i></p>
Strengthen parent/ business partnerships	<ul style="list-style-type: none"> • Establish active family support teams across all sites, each leading at least one campaign or event tied to school needs. (Wellness, Food, STEM, etc.) • Invite members of the local Chambers or Rotary clubs to events on each campus (ribbon cuttings, cultural celebrations) by November with at least 40 attendees across events. <p><i>Target: 20 business gifts across tiers (\$1K–\$5K+); minimum \$30K raised- Host 4 campus-based Chamber/Rotary events (1 per site by March 2026)</i></p>
School- Based Fundraising	<ul style="list-style-type: none"> • Launch and onboard all schools to a standardized fundraising request and tracking system (integrated with CRM or shared dashboard). • 90% of site-based campaigns are tracked and reported using shared tools, including year-end summaries prepared for board and donor communications. <p><i>Goal: 2-3 site-led campaigns raising \$10K-15K each</i></p>