

Received

DEC 16 2024

Office of the City Clerk  
City of Marco Island, Florida



December 13, 2024

Dear City Manager,

Please accept my proposal for the Fundraising Consultant position RFP 2025-004 with the City of Marco Island. With over 26 years of experience in philanthropy and a passion for environmental stewardship, I bring a proven track record of transforming bold visions into impactful realities, particularly in land acquisition services and improving water quality.

As the former Executive Director of the Erin Brockovich Foundation, I successfully led initiatives combining strategic planning with community engagement. Highlights include:

- **Building Trust-Based Partnerships:** Aligning donor passions with environmental initiatives to foster lasting advocacy and support.
- **Securing Transformative Funding:** Crafting proposals that secured multi-million-dollar grants and major gifts to address critical challenges and enable growth.
- **Driving Environmental Solutions:** Mobilizing stakeholders for projects like water quality improvement and habitat restoration, achieving sustainable outcomes.

Throughout my career, I have developed strategic fundraising plans, cultivated major donor relationships, and inspired action through compelling narratives. Marco Island's commitment to safeguarding water resources and advancing environmental stewardship deeply resonates with me. I am eager to contribute my expertise to help achieve these vital goals.

Thank you for considering my application. I look forward to the opportunity to discuss how my skills can support Marco Island's vision.

Respectfully submitted,

A handwritten signature in blue ink that reads "Melvin C. Phillips, m.s.w." The signature is written in a cursive style.

[www.impact-philanthropy.org](http://www.impact-philanthropy.org)

239-537-8355

4001 Treasure Cove Circle Naples, Fl 34114

**Table of Contents:**

Page 1	Cover Page, Overview
Page 2	Table of contents
Pages 3- 15	Completed Pages 12 – 23 of RFP (Tab 1)
Page 16	Experience of Fund Raising and Grant Writing (Tab 2)
Page 17	Professional Experience (Tab 3)
Page 18 - 21	Firms Approach to the Scope of Work (Tab 4)
Page 22	Location of Primary Offices (Tab 5)
Page 23 -25	Letter of Recommendation and References (Tab 6)
Page 26	Pricing Proposal (Tab 7)
Page 29 – 34	Insurance and Other Professional licenses and Resume (Tab 9. No Tab 8 requested on RFP)

**Tab 1 Copy of forms A-J (Pages 12-23 of RFP Packet)**

**PART VI**  
**STANDARD FORMS**

**The below forms A. through J. are to be submitted with your response to this RFP**

**A. DECLARATION STATEMENT**  
**RFP No. 2025-004**

Full Name of Proposer: Melissa Phillips

\_\_\_\_\_

Main Business Address: 4001 Treasure Cove Cir, Naples, Fl. 34114

\_\_\_\_\_

Telephone No.: 239 537 8355 Fax No. N/A

Email Address: Melissa@Impact -Philanthropy.org

State License# 221859 Type Business LLC

To City Manager  
(hereinafter called the Owner)

The undersigned, as Proposer hereby declares that he has examined the Scope of Services, and informed himself fully in regard to all conditions pertaining to the work to be done. The Proposer further declares that the only persons, company or parties interested in this Proposal or the RFP to be entered into as principals are named herein; that the Proposal is made without connection with any other person, company or companies making a Proposal; and it is in all respects fair and in good faith, without collusion or fraud.

The services to be furnished by us shall be performed in accordance with the requirements of the **RFP #2025-004**. The undersigned does agree that should the firm be offered a contract, to execute that contract and present the same to the City for approval within fifteen (15) days after being notified of the award. The undersigned do further agree that failure to execute and deliver said forms of Contract within fifteen (15) days will result in damages to the City.

Further, the Bidder acknowledges receipt of Addenda as follows:

Addendum Number	Date Issued	Contractor's Signature (Full Name)
_____	_____	_____
_____	_____	_____
_____	_____	_____

IN WITNESS WHEREOF, WE have hereunto subscribed our names on this 9th day December, 2025 in the City of Naples, in the State of FL.

Firm's Complete Legal Name - Melissa Ann Cunningham

Phillips

Check one of the following:

- Sole Proprietorship
- Corporation or P.A.
- Limited Partnership
- General Partnership

Phone No. 239 537 8355

Fax No. \_\_\_\_\_

Email Melissa@Impact-Philan

\_\_\_\_\_  
Address 4001 Treasure Cove Cir

\_\_\_\_\_  
City, State, Zip

Naples, FL 34114

Typed and Written Signature

*Melissa C Phillips*

BY: Melissa C Phillips

\_\_\_\_\_  
Title: Owner

**B. VENDOR INFORMATION FORM  
RFP No. 2025-004**

Company Name: IMPACT PHILANTHROPY

*If a "DBA", please be sure this is indicated on W-9*

FEIN or SS#: \_\_590\_10 6128 Service or Commodity Provided \_\_\_Consulting\_\_\_

Mail Address: 4001 Treasure Cove Cir, Naples, FL 34114

City: \_\_\_Naples\_\_\_ State: \_\_\_Fl\_\_\_ Zip+4: \_\_34114-3984

Remit Address: \_\_\_Same\_\_\_ City: \_\_\_\_\_  
 \_\_\_\_\_ State: \_\_\_\_\_ Zip+4: \_\_\_\_\_

Phone: 239 537 8355 Email: Melissa@Impact-Philanthropy.org

Purchase Orders to be sent to: \_\_\_Same\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

Accounts Receivable Contact Name: \_\_\_\_\_  
 Phone: \_\_\_\_\_

Email: \_\_\_\_\_ Vendor Instructions \_\_\_\_\_ Other \_\_\_\_\_

If your company provides services performed on City property, you will also be required to submit an ACORD Insurance Certificate naming The City of Marco Island as an additional insured, along with a copy of the additional insured endorsement from your policy, prior to services being rendered.

The City of Marco Island is exempt from the payment of Florida sales and use tax. Copies of the City's Sales Tax Exemption Certificate are available upon request to: [Ajohenning@cityofmarcoisland.com](mailto:Ajohenning@cityofmarcoisland.com)

The City's payment terms are net 30 and all invoices/billing should be sent to: [accountspayable@cityofmarcoisland.com](mailto:accountspayable@cityofmarcoisland.com)

A completed Form W-9 must be submitted with this Vendor Information Form.

Printed Name: \_\_Melissa Phillips\_\_ Title \_\_\_Owner\_\_\_

Vendor Signature:  Date: 12/12/2024

**C. E-VERIFY  
RFP No. 2025-004**

The City of Marco Island will not intentionally award publicly-funded contracts to any contractor who knowingly employs unauthorized workers, constituting a violation of the employment provisions contained in 8 U.S.C. Section 1324a(e) (Section 2274A(e) of the Immigration and Nationality Act (“INA”)). The City shall consider the employment by any contractor of unauthorized aliens a violation of Section 274A(e) of the INA shall be grounds for unilateral cancellation of this Agreement by the City.

Vendor/Contractor shall utilize the U.S. Department of Homeland Security’s E-Verify system, in accordance with the terms governing use of the system, to confirm the employment eligibility of:

1. all persons employed by the Vendor/Contractor during the term of the Contract to perform employment duties within Florida; and
2. all persons, including subcontractors, assigned by the Vendor/Contractor to perform work pursuant to the contract with the Agency.

You may also sign-up for free webinars on E-Verify which are offered by the U.S. Department of Homeland Security. To see the schedule of webinars and register, click on the following link, which will take you to the US Department of Homeland Security’s website: [E-Verify Webinars](#)

The Website for E-Verify is: <http://www.uscis.gov/e-verify>

(Vendor Signature)



Date 12/9/2024

\_\_\_\_\_  
Name and Title of Authorized Signee

Melissa C Phillips Owner/ President

\_\_\_\_\_  
Name of Corporation, Partnership, Trust, Etc.

Impact Philanthropy LLC

**D. CERTIFICATION REGARDING DEBARMENT, SUSPENSION, INELIGIBILITY AND VOLUNTARY EXCLUSION  
RFP No. 2025-004**

This certification is required by the regulations implementing Executive Order 12549, Debarment and Suspension (34 CFR, part 85, Section 85.510, Participant’s Responsibilities).

“The Bidder certifies that, neither the firm nor any person associated therewith in the capacity of owner, partner, director, officer, principal, investigator, project director, manager, auditor, and/or position involving the administration of federal funds:

- (a) is presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from covered transactions, as defined in 49 CFR s29.110(a), by any federal department or agency;
- (b) has within a three-year period preceding this certification been convicted of or had a civil judgment rendered against it for: commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a federal, state, or local government transaction or public contract; violation of federal or state antitrust statutes; or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, or receiving stolen property;
- (c) is presently indicted for or otherwise criminally or civilly charged by a federal, state, or local governmental entity with commission of any of the offenses enumerated in paragraph 9(b) of this certification; and
- (d) has within a three-year period preceding this certification had one or more federal, state, or local government public transactions terminated for cause or default.

The Bidder certifies that it shall not knowingly enter into any transaction with any subcontractor, material supplier, or vendor who is debarred, suspended, declared ineligible, or voluntarily excluded from participation in this project by any federal agency unless authorized by the Florida Department of Transportation.”

  
\_\_\_\_\_  
Contractor’s Signature

Date 12/9/2024

\_\_\_\_\_  
Name and Title of Authorized Signee

Melissa Phillips

\_\_\_\_\_  
Name of Corporation, Partnership, Trust, Etc.

Impact Philanthropy

(SEAL)



**F. SWORN STATEMENT UNDER SECTION 287.133 (3)(a), FLORIDA STATUTES, ON PUBLIC ENTITY CRIMES  
RFP No. 2025-004**

THIS FORM MUST BE SIGNED IN THE PRESENCE OF A NOTARY PUBLIC OR OTHER OFFICER AUTHORIZED TO ADMINISTER OATHS.

1. This sworn statement is submitted with Bid, Proposal or Contract No. 2025-004 for Grant Writing or Fundraising Services.

2. This sworn statement is submitted by IMPACT PHILANTHROPY  
(name of entity submitting sworn statement)

whose business address is: 4001 TREASURE COVE CIR, NAPLES, FL.  
34114

and its Federal Employer Identification Number (FEIN) is \_\_\_\_\_  
(If the entity has no FEIN, include the Social Security Number of the individual signing this sworn statement: \_\_\_\_\_.)

3. My name is MELISSA PHILLIPS and my relationship to the entity named (please print name of individual signing) above is OWNER.

4. I understand that a “public entity crime” as defined in Paragraph 287.133(1)(g), **Florida Statutes**, means a violation of any state or federal law by a person with respect to and directly related to the transaction of business with any public entity or with an agency or political subdivision of any other state or of the United States, including, but not limited to, any bid or contract for goods or services to be provided to any public entity or an agency or political subdivision or any other state or of the United States and involving antitrust, fraud, theft, bribery, collusion, racketeering, conspiracy, or material misrepresentation.

5. I understand that “convicted” or “conviction” as defined in Paragraph 287.133(1)(b), **Florida Statutes**, means a finding of guilt or a conviction of a public entity crime, with or without an adjudication of guilt, in any federal or state trial court of record relating to charges brought by indictment or information after July 1, 1989, as a result of jury verdict, non-jury trial, or entry of a plea of guilty or nolo contendere.

6. I understand that an “affiliate” as defined in Paragraph 287.133(1)(a), **Florida Statutes**, means:

a. A predecessor or successor of a person convicted of a public entity crime; or

b. An entity under the control any natural person who is active in the management of the entity and who has been convicted of a public entity crime. The term “affiliated” includes those officers, directors, executives, partners, shareholders, employees, members, and agents who are active in the management of an affiliate. The ownership by one person of shares constituting a controlling interest in another person or a pooling of equipment or income among persons when not for fair market value under an arm’s length agreement, shall be a prima facie case that one person controls another person. A person who knowingly enters into a joint venture with a person who has been convicted of a public entity crime in Florida during the preceding 36 months shall be considered an affiliate.

c. I understand that a “person” as defined in Paragraph 287.133(1)(e), **Florida Statutes**, means any natural person or entity organized under the laws of any state or of the United States with the legal power

to enter into binding contract and which bids or applies to bid on contracts for the provision of goods or services let by a public entity, or which otherwise transacts or applies to transact business with a public entity. The term

“person” includes those officers, directors, executives, partners, shareholders, employees, members, and agents who are active in management of an entity.

d. Based on information and belief the statement that I have marked below is true in relation to the entity submitting this sworn statement. (indicate which statement applies.)

\_\_\_\_\_ Neither the entity submitting this sworn statement, nor any officers, directors, executives, partners, shareholders, employees, members, or agents who are active in management of the entity, nor any affiliate of the entity have been charged with and convicted of a public entity crime subsequent to July 1, 1989.

\_\_\_\_\_ The entity submitting this sworn statement, or one of the officers, directors, executives, partners, shareholders, employees, members, or agents who are active in management of the entity, or an affiliate of the entity has been charged with and convicted of a public entity crime subsequent to July 1, 1989.

\_\_\_\_\_ The entity submitting this sworn statement, or one or more of its officers, directors, executives, partners, shareholders, employees, members, or agents who are active in the management of the entity, or an affiliate of the entity has been charged with and convicted of a public entity crime subsequent to July 1, 1989. However, there has been a subsequent proceeding before a Hearing Officer of the State of Florida, Division of Administrative Hearings and the Final Order entered by the Hearing Officer determined that is was not in the public interest to place the entity submitting the sworn statement on the convicted vendor list. (attach a copy of the final order)

I UNDERSTAND THAT THE SUBMISSION OF THIS FORM TO THE CONTRACTING OFFICER FOR THE PUBLIC ENTITY IDENTIFIED IN PARAGRAPHS 1-3 (ONE THRU THREE) ABOVE IS FOR THAT PUBLIC ENTITY ONLY AND, THAT HIS FORM IS VALID THOROUGH DECEMBER 31 OF THE CALENDAR YEAR IN WHICH IT IS FILED. I ALSO UNDERSTAND THAT I AM REQUIRED TO INFORM THE PUBLIC ENTITY PRIOR TO ENTERING INTO A CONTRACT IN EXCESS OF THE THRESHOLD AMOUNT PROVIDED IN SECTION 287.017, FLORIDA STATUTES FOR CATEGORY TWO OF ANY CHANGE IN THE INFORMATION CONTAINED IN THIS FORM.

Melissa C. Phillips, MSW  
(Signature)

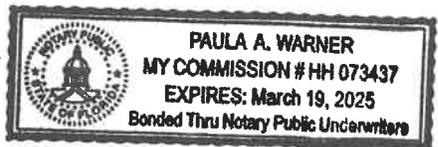
12-9-24  
(Date)

STATE OF FLORIDA  
COUNTY OF COLLIER

PERSONALLY APPEARED BEFORE ME, the undersigned authority, MELISSA PHILLIPS who, after first being sworn by me, affixed his/her signature in the space provided on this 9<sup>th</sup> day of DECEMBER 2024.

Paula A. Warner

NOTARY PUBLIC  
Commission number: HH073437  
Commission expires: MARCH 19, 2025





**H. AFFIDAVIT ATTESTING TO  
NONCOERCIVE CONDUCT FOR LABOR OR SERVICES**

Effective July 1, 2024, Section 787.06, Florida Statutes, a nongovernmental entity executing, renewing, or extending a contract with the City is required to provide an affidavit, signed by an officer or a representative of the nongovernmental entity under penalty of perjury, attesting that the nongovernmental entity does not use coercion for labor or services as defined in Section 787.06(2)(a), Florida Statutes.

By signing below, I hereby affirm under penalty of perjury that:

1. I have read Section 787.06, Florida Statutes, and understand that this affidavit is provided in compliance with the requirement that, upon execution, renewal, or extension of a contract between a nongovernmental entity and the City, the nongovernmental entity must attest to the absence of coercion in labor or services.
2. I am an officer or representative of IMPACT PHILANTHROPY a nongovernmental entity.
3. IMPACT PHILANTHROPY does not use coercion for labor or services as defined in the relevant section of the law.

In the presence of:

Witness #1 Print Name: KARA VALLE

Witness #2 Print Name: PAULA A WARNER

**Under penalties of perjury, I declare that I have read the foregoing and the facts stated in it are true:**

Melissa C. Phillips, MSW

Print Name: Melissa C. Phillips, MSW

Title: Owner

Entity Name: Impact Philanthropy

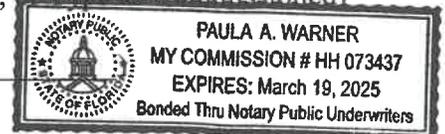
**OATH OR AFFIRMATION**

State of Florida  
County of COLLIER

Sworn to (or affirmed) and subscribed before me by means of  physical presence or  online notarization, this 9<sup>th</sup> day of DECEMBER, 2024, by MELISSA PHILLIPS (name of person) as \_\_\_\_\_ (type of authority) for \_\_\_\_\_ (name of party on behalf of whom instrument is executed).

Paula A Warner  
Notary Public (Print, Stamp, or Type as Commissioned)

- Personally known to me; or
- Produced identification (Type of Identification: \_\_\_\_\_)
- Did take an oath; or
- Did not take an oath



**I. AFFIDAVIT REGARDING PROHIBITION ON CONTRACTING WITH ENTITIES OF FOREIGN COUNTRIES OF CONCERN**

Pursuant to Section 287.138, Florida Statutes (which is expressly incorporated herein by reference), the City may not knowingly enter into a contract with an entity which would give access to an individual’s personal identifying information if (a) the entity is owned by the government of a foreign country of concern; (b) the government of a foreign country of concern has a controlling interest in the entity; or (c) the entity is organized under the laws of or has its principal place of business in a foreign country of concern.

This affidavit must be completed by an officer or representative of an entity submitting a bid, proposal, or reply to, or entering into, renewing, or extending, a contract with the City which would grant the entity access to an individual’s personal identifying information.

1. IMPACT PHILANTHROPY (“entity”) does not meet any of the criteria in paragraphs (2)(a)-(c) of Section 287.138, F.S.

In the presence of:

[Signature]  
Witness #1 Print Name: KARA VALLE

[Signature]  
Witness #2 Print Name: PAULA A WARNER

**Under penalties of perjury, I declare that I have read the foregoing and the facts stated in it are true:**

[Signature]  
Print Name: MELISSA C. PHILLIPS, MSW  
Title: Owner  
Entity Name: Impact-Philanthropy

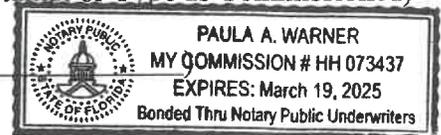
**OATH OR AFFIRMATION**

State of Florida  
County of COLLIER

Sworn to (or affirmed) and subscribed before me by means of  physical presence or  online notarization, this 9<sup>th</sup> day of DECEMBER, 2024, by MELISSA C PHILLIPS (name of person) as OWNER (type of authority) for IMPACT PHILANTHROPY (name of party on behalf of whom instrument is executed).

[Signature]  
Notary Public (Print, Stamp, or Type as Commissioned)

Personally known to me; or  
 Produced identification (Type of Identification: \_\_\_\_\_)  
 Did take an oath; or  
 Did not take an oath



### J. PROPOSERS CHECK LIST

**IMPORTANT: Sign in the spaces indicated and submit with your proposal.**

Proposer should check off each of the following items as the necessary action is completed:

1. The RFP has been signed.
2. Any required documents, qualification statements, etc. have been included.
3. Any addendum (if any) have been signed and included.

\_\_\_\_ Impact Philanthropy  
\_\_\_\_ Company Name

Mark C. Phillips, owner  
Signature & Title

Date: 12/9/2024

**Tab 2 Firms Experience with Grant Writing for Municipalities or Raising funds for Land acquisition (20 points)**

Melissa Phillips has a distinguished record of securing transformative funding for over 20 years through a combination of grants and major gift fundraising for impactful projects that address critical community needs:

1. **Affordable Housing for Frontline Workers in Immokalee:** Melissa spearheaded efforts to acquire land in Immokalee, which was developed into a subdivision providing affordable housing for frontline workers. Through a strategic blend of grant applications and major gift solicitations, Melissa secured the necessary funding to turn this vision into reality, providing a sustainable solution for housing challenges in the community. Donations exceeded \$3 million.
2. **Children's Grieving Center in Collier County:** Melissa demonstrated exceptional leadership in acquiring funding and negotiating the purchase of land for a Children's Grieving Center. The property owner had been reluctant to sell for years, but Melissa successfully negotiated an arrangement that satisfied both the property owner and the non-profit's goals. Her ability to cultivate relationships, secure multimillion-dollar gifts, and leverage grants ensured the project's success. The center now serves as a cornerstone for grief support, offering vital resources to children and families navigating loss. Donations exceeded \$4million.
3. **Water Quality Advocacy with the Erin Brockovich Foundation:** As Executive Director, Melissa led groundbreaking fundraising efforts to address water quality issues. Under her leadership, the foundation achieved a 1,000% increase in fundraising and significantly elevated its profile. By combining grassroots advocacy with high-impact donor cultivation, Melissa secured substantial funding and represented the foundation in national policy discussions, reinforcing its mission to improve environmental health.

### **Tab 3. Professional Experience in this type of work. (20 points)**

Melissa Phillips is a master fundraiser with an extraordinary track record of success across diverse fundraising channels. She is registered and certified for a Solicitation of Contributions Annual Registration, License Number FC72527 (copy included). Her expertise spans in-kind donation, property & program support grants, corporate philanthropy, major gift fundraising, and innovative approaches such as crowdfunding and ‘geo fencing’. Over her career, Melissa has personally raised over \$275 million for non-profits, leveraging her visionary strategies and relationship-driven approach to secure transformative funding.

These accomplishments highlight Melissa's exceptional experience and ability to unify diverse funding sources, build consensus among stakeholders, and deliver high-impact solutions for complex community challenges. Her expertise in negotiating, fundraising, and project execution has left a lasting legacy in each initiative she has undertaken.

One of her most notable achievements was being part of a select two-person team that secured an impressive \$20 million grant—an accomplishment that underscores her ability to deliver results on a grand scale. Beyond large-scale grants, Melissa’s fundraising acumen has led to multi-million-dollar gifts, such as securing a \$3 million capital campaign contribution from Collier County to support a groundbreaking children’s hospital. At the same time, she has successfully engaged grassroots donors, running highly effective crowdfunding initiatives that inspire community-wide participation.

Melissa’s ability to diversify funding sources has been pivotal in creating sustainable financial solutions for her organizations. She has cultivated relationships with major corporate donors, transforming their philanthropic visions into impactful investments. Her work also includes negotiating in-kind property grants, such as acquiring land for housing projects and community support centers, demonstrating her ability to unite donors around shared goals.

From securing landmark gifts at the Erin Brockovich Foundation that increased fundraising by 1,000%, to overseeing the most successful fundraising year in the Immokalee Foundation’s over 30-year history, Melissa consistently exceeds expectations. Whether partnering with major philanthropists, engaging corporate leaders, or rallying community support, Melissa’s approach combines strategic vision, relentless dedication, and unparalleled expertise to create meaningful, lasting impact.

## **Tab 4 Firms Approach to the scope of work (20 points)**

### **1. Masterful Donor Relationship Building and Stewardship**

**Goal:** Cultivate and secure major gifts to fund the initiatives.

**Actions:**

**Major Donor Identification:**

- Develop a prospect list of high-net-worth individuals and environmentally focused philanthropists with ties to Marco Island.
- Leverage relationships with local realtors, civic leaders, and environmental organizations to identify potential supporters.

**Customized Donor Outreach:**

- Create targeted presentations that highlight the immediate need for land preservation and water quality improvement, using data and visuals.
- Schedule one-on-one meetings with potential donors to understand their interests and align them with the project's goals.

**Exclusive Recognition Opportunities:**

- Offer naming rights for significant project components, such as a "Conservation Pavilion" or "Water Quality Monitoring Station."
- Develop a Legacy Society for donors contributing (City approved amount), with perks such as lifetime recognition on-site and in promotional materials.

### **2. Compelling Campaign Messaging and Public Appeals**

**Goal:** Engage the broader community and mid-level donors through an inspiring campaign.

**Actions:**

**Themed Fundraising Campaign:**

- Launch a campaign titled "Preserve Paradise: Protect Marco's Future" with a dual focus on conserving land and improving water quality.
- Develop visually appealing collateral (brochures, videos, and a campaign microsite) showcasing project goals, community benefits, and urgency.

### **Community Challenge Grants:**

- Secure a lead gift or matching grant to inspire smaller contributions. For example, for every dollar donated, a matching donor commits an additional dollar up to \$500,000.

### **Public Fundraising Events:**

- Host high-profile events such as private dinners or cocktail parties to garner support.
- Organize environmental tours of impacted areas, showing potential donors the direct need for their support.

## **3. Grant Development for Complementary Funding**

**Goal: Secure environmental and infrastructure grants to supplement donor contributions.**

### **Actions:**

#### **Grant Targeting:**

- Apply to national and regional foundations, such as The Nature Conservancy, NOAA, and the Florida Department of Environmental Protection.
- Identify corporate grant opportunities from businesses with strong ties to Florida, particularly those focused on sustainability or tourism.

#### **Blended Proposals:**

- Highlight how donor funding complements grant funding to demonstrate a well-rounded and sustainable financial approach.
- Include clear timelines, metrics, and outcomes to showcase the impact of donor and grant collaboration.

## **4. Digital Fundraising Campaigns**

**Goal: Reach younger and geographically dispersed donors.**

### **Actions:**

#### **Crowdfunding Campaign:**

- Launch a campaign on platforms like GoFundMe or Classy, for water quality and land acquisition.
- Offer tiered incentives, such as branded merchandise or exclusive virtual tours, for contributions.

### **Social Media Outreach:**

- Develop a series of engaging posts, videos, and infographics highlighting the importance of the initiatives.
- Create a hashtag campaign, such as #ProtectMarco, to encourage community involvement and sharing.

### **Email and Text Campaigns:**

- Build a segmented email list of residents, past donors, and environmentally conscious supporters.
- Send monthly updates with donation appeals tied to specific project milestones (e.g., “Help us secure 1 more parcel this month!”).

## **5. Corporate Partnerships and Sponsorships**

**Goal: Secure support from businesses and corporate foundations.**

### **Actions:**

#### **Local Business Engagement:**

- Partner with Marco Island-based businesses, such as restaurants, hotels, and tour companies, to sponsor events or make direct contributions.
- Offer co-branding opportunities on marketing materials and project sites.

#### **Corporate Social Responsibility (CSR) Proposals:**

- Approach national companies with strong CSR programs, highlighting alignment with their sustainability goals.
- Create sponsorship packages with tiered benefits, such as on-site signage, press mentions, and employee volunteer opportunities.

## **6. Transparent Reporting and Stewardship**

**Goal: Retain and re-engage donors by showcasing the impact of their contributions.**

### **Actions:**

#### **Impact Updates:**

- Send quarterly reports to all donors, including progress updates, photos, and testimonials.
- Host annual Donor Impact Tours of completed or in-progress projects.

**Recognition Events:**

- Hold an annual appreciation gathering for top donors, where they can meet project leaders and see their impact firsthand.

**Sustainability Reports:**

- Publish an annual report with detailed metrics, such as acres preserved, water quality improvements, and community engagement outcomes.
-

**Tab 5. Location Of Primary Office to Marco Island City Hall. (20points)**

Melissa Phillips has deep roots in the Marco Island community, both personally and professionally. She was a resident of Marco Island from 1996 to 2010, during which she cultivated strong working relationships with multiple donors, laying the foundation for her success in philanthropy. She is also a Leadership Marco graduate. After leaving Marco Island, Melissa relocated to Copper Cove, adjacent to Fiddler's Creek, where she currently resides with her husband and daughter at 4001 Treasure Cove Circle and is the location of her home office, phone number 239-537-8355, approximately 5 miles from the Jolly Bridge.

Melissa's connection to Marco Island is enriched by her family's active involvement in the community. Her son attended Marco Island schools, graduating from Marco Island Academy (MIA) and now attends Florida Atlantic University. During his youth, he played Marco Island Optimist Club soccer, where his father served as a coach. He later played for Marco Island Charter Middle School (MICMS), eventually becoming captain of the MIA soccer team. Melissa's daughter attended Tommy Barfield Elementary and is now a 6th grader at MICMS, where she participates in volleyball, cheerleading and band.

Beyond her family's academic and athletic engagements, Melissa and her family have volunteered extensively with Marco Island's non-profits, including the Marco Island Center for the Arts, Meals of Hope, Optimist Soccer and various school-related initiatives. This ongoing involvement reflects their dedication to enhancing the community's well-being and cultural vitality.

With her office at Impact Philanthropy conveniently located within the region, Melissa continues to leverage her long-standing ties to Marco Island. Her personal and professional experiences enable her to foster meaningful connections, drive impactful initiatives, and strengthen the philanthropic landscape in Southwest Florida.

**Tab 6. Client References 3-5.**

# THE WASIE FOUNDATION

---

*A Philanthropic Legacy*

December 10, 2024

To Whom it May Concern:

I am delighted to recommend Melissa Phillips for any position that can utilize her considerable skills. As President and CEO of The Wasie Foundation, I have worked closely with Melissa and am consistently impressed with her high professional standards, leadership skills, concern for the welfare of the constituents she serves, and deep appreciation for the organization's mission.

Melissa has occupied roles of central importance at significant non-profit organizations. At Golisano Children's Hospital, she leveraged her knowledge to change the community's mindset about the hospital and the need for it. Her strategy led to a change in Collier County's understanding of how important this children's hospital could be to our community. She worked with community leaders, city council members, and the public to join the board and publicly support the hospital. Her brilliant efforts paid off in over \$10,000,000 in funding and equally important changing Collier County's understanding of the importance of a children's hospital.

Again and again, Melissa's vision and guidance transform opportunities for the communities she serves. Her leadership is exemplary, bringing in the right people for the job and then guiding them into the organizational culture to produce the needed results. For example, she hired a grant writer for The Immokalee Foundation and used the writer's experience to exceed the grant funding goals by over 200%. Melissa also used this staff member's skills to write donor letters and assist in development of strategic planning documents. She understands bringing in the best people and utilizing them to serve the organization's most critical needs.

Melissa's leadership gains consensus in the board room and then takes it beyond the board room. She understands hearing the boards' directives and shaping them into action. Her grit, problem-solving, and leadership style make her an asset to every team she leads. Her methods to get the most out of her staff start with listening, mentoring, encouraging, and working alongside each team member. She is driven and knows how to bring the resources and talent into synchronicity to achieve incredible results.

Melissa applies herself to every task and challenge with perceptiveness, ingenuity, and a fundamental human instinct. She is well positioned to advance the work of any organization.

Without reservation, I wholeheartedly endorse her.

*Gregg D. Siquist*

# Melissa Phillips

Impact Philanthropy

## REFERENCES

### CONTACT

 1-239-537-8355

 Melissa@impact-philanthropy.org

 Naples, Florida 34114

 <https://www.linkedin.com/in/melissaphillips34145/in/username>

Hyla Crane  
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Mari Rubenstein  
**Editor**  
**Haute Living Magazine**  
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Randall Kenneth Jones  
**Founder**  
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1-571-238-4572

Brittni Brown  
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1-225-315-0210

Evelyn Rosetti-Ryan  
**Executive Director**  
Our Daily Bread  
Evelyn@ourdailybreadfoodp  
anry.org  
1-646-643-0094

**Tab 7. Pricing proposal (10 Points)**

The below pricing proposal is based on consulting services that includes the services of Melissa Phillips. Additional staff or costs requested by the City, or suggested by Impact Philanthropy as part of the fundraising strategy, (such as mailings, added donor software, lunch / coffee meetings for the sole purpose of fundraising) are not included and will be billed on to the monthly invoice for the following month. Example – January expenses will show on February’s invoice, February expenses will show on March etc.

**Example Invoice**

Monthly Consulting Charges for the City of Marco Island	\$7000.00
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Additional expenses will be pre-approved by City Manager

<b>Total Invoice</b>	<b>\$7000.00</b>
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Invoices are made payable to Impact Philanthropy at the address provided or by Automatic Bank Transfer and are due no later than the 1<sup>st</sup> of the preceding month. Invoices will be sent no later than 15 days in advance of the due date.





**COLLIER COUNTY BUSINESS TAX**  
COLLIER COUNTY TAX COLLECTOR - 2800 N. HORSESHOE DRIVE - NAPLES FLORIDA 34104 - (239) 252-2477  
VISIT OUR WEBSITE AT: [www.colliertaxcollector.com](http://www.colliertaxcollector.com)  
THIS RECEIPT EXPIRES **SEPTEMBER 30, 2025**

BUSINESS TAX NUMBER: **221859**

LOCATION: 4001 TREASURE COVE CIR  
ZONED: HOME OCC PL2022-1678  
BUSINESS PHONE: 239-537-8355  
STATE OR COUNTY LIC #:



LEGAL FORM  
LLC

DISPLAY AT PLACE OF BUSINESS FOR PUBLIC INSPECTION.  
FAILURE TO DO SO IS CONTRARY TO LOCAL LAWS

IMPACT PHILANTHROPY LLC

PHILLIPS, MELISSA ANN

4001 TREASURE COVE CIR  
NAPLES, FL 34114

CLASSIFICATION: CONSULTANT  
CLASSIFICATION CODE: 03602901

This document is a business tax only. This is not certification that licensee is qualified.  
It does not permit the licensee to violate any existing regulatory zoning laws of the state, county, or cities  
nor does it exempt the licensee from any other taxes or permits that may be required by law.

**-THIS TAX IS NON-REFUNDABLE-**

DATE 12/10/2024  
AMOUNT 36.00  
RECEIPT 503-25-00376165

*Rob Stoneburner*



[Department of State](#) / [Division of Corporations](#) / [Search Records](#) / [Search by Entity Name](#) /

## Detail by Entity Name

Florida Limited Liability Company  
IMPACT PHILANTHROPY LLC

### Filing Information

<b>Document Number</b>	L16000041828
<b>FEI/EIN Number</b>	APPLIED FOR
<b>Date Filed</b>	02/29/2016
<b>State</b>	FL
<b>Status</b>	ACTIVE
<b>Last Event</b>	REINSTATEMENT
<b>Event Date Filed</b>	04/04/2022

### Principal Address

4001 Treasure Cove Cir  
SUITE 101 A  
Naples, FL 34114

Changed: 04/04/2022

### Mailing Address

4001 Treasure Cove Cir  
SUITE 101 A  
Naples, FL 34114

Changed: 04/04/2022

### Registered Agent Name & Address

Phillips, Jonathon  
4001 TREASURE COVE CIR  
NAPLES, FL 34114

Name Changed: 04/04/2022

### Authorized Person(s) Detail

#### **Name & Address**

Title MGR

PHILLIPS, MELISSA A  
4001 TREASURE COVE CIR  
NAPLES, FL 34114

**Title AP**

PHILLIPS, JONATHON G  
4001 TREASURE COVE CIR  
NAPLES, FL 34114

**Annual Reports**

<b>Report Year</b>	<b>Filed Date</b>
2022	04/04/2022
2023	01/24/2023
2024	01/29/2024

**Document Images**

<a href="#">01/29/2024 -- ANNUAL REPORT</a>	<a href="#">View image in PDF format</a>
<a href="#">01/24/2023 -- ANNUAL REPORT</a>	<a href="#">View image in PDF format</a>
<a href="#">04/04/2022 -- REINSTATEMENT</a>	<a href="#">View image in PDF format</a>
<a href="#">02/29/2015 -- Florida Limited Liability</a>	<a href="#">View image in PDF format</a>

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**FLORIDA DEPARTMENT OF AGRICULTURE AND CONSUMER SERVICES**  
**COMMISSIONER WILTON SIMPSON**

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August 20, 2024

Refer To: FC72527

IMPACT PHILANTHROPY LLC  
4001 TREASURE COVE CIR  
NAPLES, FL 34114-3984

RE: IMPACT PHILANTHROPY LLC  
REGISTRATION#: FC72527  
EXPIRATION DATE: July 5, 2025

Dear Sir or Madam:

The above-named professional fundraising consultant has complied with the registration requirements of Chapter 496, Florida Statutes, the Solicitation of Contributions Act. The registration is valid for one year.

In addition, a copy of any contract or agreement with a charitable organization or sponsor must be filed with the Division no less than 5 days prior to the services being performed by the consultant.

Thank you for your cooperation. If you have any questions, please contact this office.

Sincerely,

WILTON SIMPSON  
COMMISSIONER OF AGRICULTURE

***Gloria Meadows***

Gloria Meadows  
Regulatory Consultant  
850-410-3851  
Fax: 850-410-3804  
E-mail: [gloria.meadows@fdacs.gov](mailto:gloria.meadows@fdacs.gov)

**\*\*Please submit contracts to the address below  
or by email at [charities@FDACS.gov](mailto:charities@FDACS.gov):  
Florida Department of Agriculture and Consumer Services  
Solicitation of Contributions  
2005 Apalachee Parkway  
Tallahassee, FL 32399-6500**

# MELISSA C. PHILLIPS, MSW

**Master Fundraiser** who has personally raised \$275 million in donations for non-profits over 23 years. I possess a rich background in senior management roles within the philanthropic sector. I have led teams and volunteers to surpass their goals while being mission-focused



[mw34145@yahoo.com](mailto:mw34145@yahoo.com)

+1-239-537-8355

Naples, Florida, USA

## EXPERIENCE

2021 – Current

Naples, Florida, USA

### Philanthropy Consultant – Impact Philanthropy (IP)

Advised philanthropists in giving and non-profit development, non-profits in fundraising, and for-profits in social engagement. Supported non-profit clients in building long-term financial stability through targeted donor communications in Gift & Estate Planning

2019 – 2021

Florida

### Vice President of Philanthropy – The Immokalee Foundation

Led fundraising team, broke all fundraising records. Supported identification, cultivation, and solicitation of major and planned gifts and developed stewardship strategies for major donors. Secured the first million-dollar gift in the 30-year history. Created the model for The Learning Lab to be self-sustaining. Led all marketing.

2018 – 2019

Naples, Florida

### Executive Director – The Erin Brockovich Foundation

Spearheaded the launch of legacy, annual, and monthly giving programs, as well as marketing and public relations efforts. Representing the organization worldwide.

2016 – 2018

Naples, Florida

### Vice President of Philanthropy – Avow Foundation

Developed strategies and plans to secure large gifts from major donors. Recruited and led a team to break philanthropy and resale records. Led and increased retail operations and volunteers.

2012 – 2016

Naples, Florida

### Senior Director of Gift Planning Foundation – Lee Memorial Health System

Part of the team that undertook a \$100 million capital campaign in Collier County to build the first Children's Hospital in Southwest Florida. Secured a \$3 million gift from a disgruntled donor, largest gift in Collier County.

## EDUCATION

Fort Myers, Florida

### Master's in Social Work (MSW) – Florida Gulf Coast University

Accumulated 8-year qualification.

Fort Myers, Florida

### Bachelor's Degree in Human Services – Florida Gulf Coast University

## EXPERTISE

- **Fundraising Strategy & Planning:** Developing strategies to help non-profits generate sustainable funding and leverage current donors.
- **Donor Insights:** Writing targeted donor profiles and strategies, including how to prioritize asks and suggested ask amounts.
- **Program Evaluation:** Evaluating non-profits' fundraising and social services programs to make more money available to their missions.
- **Social Engagement Programming:** Developing meaningful social engagement programs for non-profits.
- **Geo-fencing:** Implementing strategy and programs to drive traffic to a non-profit's website for marketing and increased donor base.
- **Training:** Training non-profits in team motivation, how to ask for donations, relationship building, and creative storytelling
- **Leadership Development:** Coaching non-profit CEOs and Boards on governance, fundraising, team building, and getting a YES for giving.
- **Philanthropy Consulting:** Evaluate non-profit partners, agreements, programs, and succession plans.
- **Event Planning:** Planning of event from start to finish, create compelling sponsorship and underwriting opportunities for donors, invitations.

## EXECUTION

- Exceeded Board-driven funding goals to achieve most monies raised in the 30-year history of Immokalee Foundation, including two seven-figure gifts within two weeks.
- Increased Immokalee Foundation media presence by 74% in first year
- Increased fundraising by 1,000% at Erin Brockovich Foundation
- Represented Erin Brockovich locally and nationally regarding policy issues.
- Secured several multi-million-dollar gifts at Avow Foundation, increasing funding from \$1.7 million to \$6.25 million in 8 months
- Increased Avow Foundation boutique revenue from operating the red to grossing over \$1 million within one year
- Created and secured funding for specialized LGBTQ services and support groups at the Avow Foundation
- Increased funding and secured the most significant gift, of \$3 million, from Collier County to the capital campaign for Lee Memorial Health System
- Mentored team members to progress in their career, many in management positions.
- Executed events from small gatherings to over 700 people in attendance.

AGENT OF SOCIAL CHANGE –  
DISRUPTING THE OLD WAYS OF  
FUNDRAISING AND LOOKING AT NEW  
SOCIAL ENGAGEMENT