

<b>GOAL AREA #1</b>	
<b>STRATEGIC PLAN IMPLEMENTATION</b>	<i>Lead implementation of the CABE Strategic Plan/COMPASS:</i>
<b>RESPONSIBILITIES &amp; DUTIES</b>	<b>CEO REPORT</b>
<p>(1) Serving as the strategic plan manager, ensuring that all work plans for Board-identified priority projects are fully implemented and funded;</p> <p>(2) Providing support, guidance and oversight to all Strategic Plan/COMPASS consultants, as well as the educational consultant;</p> <p>(3) Engaging CABE staff in actively supporting implementation of the Strategic Plan/COMPASS priorities and work plans;</p> <p>(4) Providing the Board with regular progress reports and analyses of Strategic Plan/COMPASS work plan implementation.</p>	<ul style="list-style-type: none"> <li>• Led Staff Meetings in April, May and June that focused on the understanding, deeper connections and implementation of the Strategic Plan, how it is connected to our daily work, and along with team relational building, updates, projects, etc.</li> <li>• Supported 3.1 Family and Community Engagement through support of P2I (i3 grant, contracts, marketing, growing the team, addressing and working on budget issues, etc.). Met with staff, addressed staffing issue and needs, engaged P2I staff in other events.</li> <li>• P2I team and board members visited a SEAL model site as tie to priority areas 4.1, 2.2, 2.4 and 3.1. Asked CC consultant on multilingual excellence to organize.</li> <li>• Continued to support Strategic Plan 2.2 and 2.3 directly through meeting with director errkly supporting the work on the Professional Development Framework and collaboration and planning for the future with PDS and planning for 2015-16 and 2016-17 conference/professional development offerings</li> <li>• Worked closely with team members to advance the development of the Design For Success website added by elements of content and design.</li> <li>• Met and communicated regularly with consultant Claudia Lockwood to provide feedback, information, and support for the implementation of 4.1 (including on 2-Way Directory, indicators of exemplary multilingual programs, University Seal of Biliteracy, SEAL visits, EdGE, ELLLI, etc.)</li> <li>• Met with Enrique Gonzalez regularly in person and via phone to deepen our work with Strategic Partnerships (via partnership with Mexico) and to plan the Binational Professional Development Project and partnership with Mexcio.</li> <li>• Communicated regularly with Membership consultant (Stanley Lucero) to institute Basecamp, Smart Reg Membership Database, chapter consolidation, and membership receptions</li> <li>• Had work plans posted to our Board Webpage for easy access by Board members.</li> <li>• Included information and reminders for CABE Team members on the impact and relevance of</li> </ul>

the Strategic Plan on our daily tasks and rolls and responsibilities.

- Supported and facilitated the gathering of the CABE Board in Los Angeles for the board installation reception, dinner and meeting.
  - Developed annual report template
  - Met with Martha ZD regularly to support the development of the workplan for 3.4, advocacy
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## GOAL AREA #2

### CABE LEADERSHIP

*Maintain and promote the CABE Essentials (values, vision/mission, theory of action, principles, strategic goals, and instructional priorities)*

### RESPONSIBILITIES & DUTIES

### CEO REPORT

- (1) Implementing and evaluating strategic and financial goals;
- (2) Engaging board, staff, and partners to support CABE vision and strategic plan;
- (3) Developing and maintaining strong fiscal structures to support the implementation of the CABE strategic plan.

- Met with Finance and Executive Committees in June to discuss and support issues and requests and move forward with the implementation of the CABE Strategic Plan
- Met with Investment Advisor from Morgan Stanley
- Continued to communicate with Realtor as a follow up on the Board and Staff's input on the effectiveness and location of our building.
- Planned for meetings to create a plan for the future implementation and sustenance of the Project 2 INSPIRE program after the I3 grant ends in 2017.
- Met weekly and worked closely with PDS Director on the programmatic and fiscal growth of CABE PDS and the development of the PD Framework that is directly correlated to the strategic plan and the CABE Essentials.
- Communicated with Board Members on actions in strategic plan
- Supported the successful completion of the 2014-15 audit and approval by Audit Committee.
- Met with Accounting Manager to develop and complete budget process for 2016-17.
- Began planning for the 2017 Multilingual Educator with CABE Education Consultant
- Partner with the Lara Multilingual EdGE campaign committee and remain in close contact with campaign staff regarding the initiative and campaign for November 2016 ballot
- Worked with legislative advocate to ensure CABE is closely involved with EdGE Campaign.
- Continued to work closely and meet weekly with CABE Accounting Consultant, Yvette Chong-Coontz to ensure that funding structures are in place in the 2015-16 budget to support the implementation and growth of the strategic plan—specifically re CABE PDS and department budgets.
- Emphasized the CABE Vision and Essentials as our foundation on regular (daily/weekly basis) through all communication, social networking, promoting, branding, legislative action, etc.
- Met regularly with and supported Martha Zaragoza Diaz (Legislative Advocate) along with Californians Together Partner Shelly Spiegel-Coleman on policy, CDE, and state board of education issues.
- Attended the steering group meetings and the May meeting of the English Learner Leadership and Legacy group.
- Provided weekly information and orientation to the CABE Compass to staff through the Monday Message and in staff meetings as well as at the staff retreat.

## GOAL AREA #3

<b>BUDGET AND FUND DEVELOPMENT</b>	<i>(REFER TO COMPASS ACTION PLAN 4.6)</i>
<b>RESPONSIBILITIES &amp; DUTIES</b>	<b>CEO REPORT</b>
<p>(1) Establishing budgets, budget strategy, and fund development goals for all Strategic Plan/ COMPASS priority projects, as well as for operational priorities;</p> <p>(2) Establishing a system of contract development, management, and monitoring;</p> <p>(3) Establishing a system of fund solicitation strategies;</p> <p>(4) Developing a portfolio of cultivation strategies (“making friends”);</p> <p>(5) Conducting an annual membership drive to increase membership;</p> <p>(6) Maintaining, monitoring, and evaluating the budgeting and fund development plan and process;</p> <p>(7) Raising funds for CAFE’s operations from any and all sources, private and public;</p> <p>(8) Guiding staff and bringing about efficient fiscal operations and activities.</p>	<ul style="list-style-type: none"><li>• Worked extensively with accounting consultant, business team and coordinating council to implement budget for 2015-16 with fidelity and to develop preliminary budget for 2016-17</li><li>• Realized increase in attendance and revenues for CAFE 2016 by over 5000 attendees.</li><li>• Establish and distribute bonus amounts and letters</li><li>• Met CAFE fiscal goals—exceeded sponsorship goals for 2015-16 and ended the fiscal year with an approximate surplus of \$40,000.</li><li>• Received \$50,000 grant from the Sobrato Family Fund for Policy and Programmatic Support</li><li>• Advanced Plaza Comunitaria program with grants and contracts both locally and statewide</li><li>• Worked with Accounting Consultant to move investment policy and strategy forward.</li><li>• \$1,000,000 reserve goal for CAFE and approved investment plan after Board approval.</li><li>• Exceeded registration number goals for regional conferences in Anaheim and Riverside and for CAFE 2016.</li><li>• Supported and communicated with accounting consultant and business team on the 2014-15 audit and facilitated Audit Committee meeting and approval.</li><li>• Requested and supported coordinating council members meeting with Accountant Consultant on a monthly basis to review program budgets.</li><li>• Meet weekly in person with accounting consultant and business team members.</li><li>• Worked closely with Consultant for Strategic Partnerships to create a short, medium and long term plan for corporate relationship and sponsorships</li><li>• Monitored and supported the implementation of the system of contract development, management, and monitoring which is managed by our Administrative Systems Manager</li><li>• Planned for and facilitated 1 call with the Financial Committee.</li></ul>

<b>GOAL AREA #4</b>	<b>DESCRIPTION</b>
<b>BOARD ENGAGEMENT &amp; LEADERSHIP</b>	<i>Work collaboratively with the Board Executive Committee to design and roll out a Board engagement and leadership strategy for engaging CABA Board in effectively and compellingly understanding, communicating, and enacting the CABA Strategic Plan/COMPASS</i>
<b>RESPONSIBILITIES &amp; DUTIES</b>	<b>CEO REPORT</b>
<p>(1) Developing effective communication strategies;</p> <p>(2) Providing leadership to board members in implementing the CABA strategic plan;</p> <p>(3) Creating a project management process to contribute to and monitor the progress of the strategic plan.</p>	<ul style="list-style-type: none"> <li>• Communicated regularly via phone, text, social media, email, and in person with all board members.</li> <li>• Met regularly with President Karling Aguilera Fort via phone and in person</li> <li>• Met with board president via phone regarding board meetings, CABA Compass, budget for 2015-16, CABA Compass Work Plans, CABA 2016 and 2017 plans, and focus areas for 2015-2016 and 2016-17.</li> <li>• Celebrated success of CABA 2016 with Board members and staff.</li> <li>• Attended Binational Meeting in Tijuana with Board President Karling Aguilera Fort and two CABA Team Members</li> <li>• Successfully conducted fair Board election and results</li> <li>• Met with Executive committee in preparation for March Board meeting.</li> <li>• Explored different project management systems to consider for implementation to provide easier access to strategic plan reports.</li> <li>• Created roles and responsibilities and schedules for all board members for CABA 2016 and distributed via email for feedback.</li> <li>• Have attempted several times to contact Talia Eisen to provide follow up and coaching on CEO Evaluation but have not received a response. (have so far conducted one phone meeting, several email exchanges and planned for future meetings which she was not able to conduct)</li> <li>• Traveled to Washington DC to participate in meetings with OELA, the National EL Roundtable, and dual language immersion research symposium.</li> <li>• Arranged for board members to visit SEAL model site in Redwood City.</li> <li>• Continued the implementation of Basecamp, a project management software to be expanded to be used for membership, the strategic plan consultants, and potentially with membership.</li> <li>• Concurred regularly with Legal Counsel, Mary Hernandez, on several issues in relation to and impacting the board (contracts, plans).</li> <li>• Continue to lead staff in refocusing on the goals and priorities of the CABA Compass</li> <li>• Addressed request from Board regarding affiliates election, bylaws staffing, fiscal, etc.</li> </ul>

## GOAL AREA #5

### STAFF ENGAGEMENT & LEADERSHIP.

*(Refer to Strategic Plan/COMPASS Action Plan 4.5)*

### RESPONSIBILITIES & DUTIES

### CEO REPORT

- (1) Creating an office culture of quality service, support, leadership, and accountability;
- (2) Engaging all staff in the development of work teams and work plans tied directly to the CAFE strategic plan.
- (3) Intentionally seeking alignment across CAFE departments and teams to build CAFE's capacity for leadership, engagement, and accountability.
- (4) Establishing and utilizing an external committee or advisory board of experts, colleagues, and practitioners to provide input and feedback to staff and the Board regarding CAFE's developmental work.
- (5) Developing professional growth plans with staff to support their advancement and learning.

- Celebrated with all team members on the success of CAFE 2016.
- Presented staff professional development and continuing education initiative to encourage staff to grow and develop new skills
- Meet regularly with staff—whole staff meetings, coordinating council, teams, and individuals.
- Sent weekly Monday Message to Team and regular consultants regarding cross team information, news and updates, and connection of work to the CAFE vision and Strategic plan.
- Recognized staff for the number of years served and accomplishments at CAFE
- Prioritize touching base and meeting personally with each staff member every 1-2 weeks.
- Continued to encourage and guide team collaboration, planning and growth
- Regularly engaged team in discussions regarding leadership during coordination council
- Continue to encourage and build staff level of professionalism, growth, and cross team connections.
- Supported systemic growth and use of technology throughout staff to improve services
- Celebrated graduations, birthdays and special events
- Met with staff in monthly staff meeting and with coordinating council twice per month
- Addressed growth and performance needs with different staff members
- Focused with team on creating systemic and organized flows to work projects to enhance professionalism and efficiently in work.
- Discussed different options for restructuring parts of the organization to meet our growing needs.

## GOAL AREA #6

### OPERATIONAL LEADERSHIP

*Manage the operation and administration of the CAFE organization to ensure CAFE's organizational, programmatic, and fiscal success and sustainability.*

### RESPONSIBILITIES & DUTIES

### CEO REPORT

- Providing strong leadership and professional model for staff;
- Assuring sound financial and human resources policies.
- Developing and maintaining strong relationships with partner organizations.

- Continued to support the full implementation of the Telepayroll system
- Begin process to provide direction, input and support to the planning of the CAFE 2017 conference –location, contracts, speakers, structures, brochures—Sponsor/Exhibitor, Awards and registration
- Continually and regularly spoke about and share the CAFE vision and mission with partners, clients and staff—OELA, NCLR, CAFE 2016 and 2017 Planning Committee, Cal Tog, CALSA, CLSBA, DLeNM, CSBA, ACSA, PTA..
- Communicated regularly with staff through all modes of dialogue.
- Promoted recently published book “No estas solo,,,”! at regional conferences in Anaheim and Riverside.
- Continuing to work with Consultant Enrique Gonzalez to finalize MOUs with the SEE in Baja California and IME/INEA in Mexico City
- Used and promoted social media to support CAFE events, ideas and resources—recently surpassed 4500 likes.
- Continue to develop systems and protocols for efficient and smooth office operations..
- Focused on addressing, building awareness & implementing the CAFE Compass
- Conference calls with partner organizations regarding LCAP Evaluation Metrics and the reauthorization of ESEA
- Met with leadership from the 2Way Affiliate and scheduled regular meetings to support our collaboration with and growth of the affiliate.
- Supported both 2Way CAFE and CABTE as organizational affiliates
- Met/communicated with partners—NCLR, CALSA, NABE, CLSBA, Cal Tog, 2Way CAFE, CARECEN, CAFE 2016 Planning Committee Districts, Dual Language Education New Mexico, CDE, OELA, ACSA, CSBA, CLSBA,
- Oversaw repairs to roof and ceiling and rodent cleanup.
- Purchased new ergonomic chairs for al staff

**Travel Conducted:**

- San Francisco—CABE 2016 PC
- Washington CD—EL Roundtable, OELA USDOE
- San Francisco—CABE 2016 planning and celebration
- San Diego/Tijuana

**Forecasted Travel for November 2025-March 2016**

- Sacramento—SBE
- Washington DC—i3 Director's Meeting
- San Jose—ELLLI steering committee, CALSA
- Orlando—NCLR
- San Diego/Tijuana.
- San Deigo--CLSBA