

<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>• Monitored the progress and growth of implementation of the CABE Strategic Plan.</li> <li>• Collaborated with President Elodia Lampkin on the process for developing the next stage of the CABE Strategic Plan—2018-2023—in preparation for the September 2018 Board Retreat</li> <li>• Co-led Staff Retreat 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 PFE (Parent and Family Engagement) (end of the i3 grant, contracts, marketing, growing the team, addressing and working on budget issues, etc.). Met with staff, addressed staffing issue and needs. Planned and strategized for the final reporting of the I3 grant and the development and implementation of the NPD grant.</li> <li>• Continued to support Strategic Plan 2.2 and 2.3 directly through meeting with directors of Program and Events and PDS regularly supporting the work on the Professional Development Framework and collaboration and planning for the future with PDS and implementation of the 2018-2019 conference/professional development offerings. Finalized plans for 2018-19.</li> <li>• Worked closely with Laurie Nesrala, Norma Rocha, David Valencia and Jesse Acosta to advance the development and updates of the Design for Success website added by elements of content and design—in Spanish and English: CABE website, App, Resource Center, CABE and 2019 website. An added element is the development of an EL Roadmap page.</li> <li>• Met and communicated regularly with consultant Claudia Lockwood to provide feedback, information, and support for the implementation of 4.1 (including ELLLI support, 2-Way Directory, indicators of exemplary multilingual programs, University Seal of Biliteracy, SEAL visits, Prop 58 implementation, and grant development)</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</li> </ul>

Project and partnerships with Mexico—IME, SEE, INEA. Strong emphasis was placed on the presence and participation of the Binational GLAD partnership and training in July, meeting of Secretary of Education of Baja California with SPI Torlakson, high profile delegation, and confirming MOU with IME.

- Communicated regularly with Membership Team to continue use of Basecamp, Smart Reg Membership Database, chapter consolidation, and membership receptions). Supported the transition of the Membership team to be inclusive of three staff members.
- Met with Martha ZD regularly to support the development of the work plan for 3.4, advocacy, to provide feedback on policy issues and attend meetings via telephone and in person regarding EL policy with CDE, SBE, and legislation. July, Aug and Sept have been a time of focus concerning legislative and budgetary issues—Title III leads, AB2514, BTPD, ECE, etc.
- Included information and reminders for CABE Team members on the impact and relevance of the Strategic Plan on our daily tasks and rolls and responsibilities.

## GOAL AREA #2

<b>CABE LEADERSHIP</b>	<i>Maintain and promote the CABE Essentials (values, vision/mission, theory of action, principles, strategic goals, and instructional priorities)</i>
<b>RESPONSIBILITIES &amp; DUTIES</b>	<b>CEO REPORT</b>
<p>(1) Implementing and evaluating strategic and financial goals;</p> <p>(2) Engaging board, staff, and partners to support CABE vision and strategic plan;</p> <p>(3) Developing and maintaining strong fiscal structures to support the implementation of the CABE strategic plan.</p>	<ul style="list-style-type: none"> <li>• Attended and testified at State Board of Education Meeting with CABE Lobbyist Martha Zaragoza Diaz, on September 2018 re Seal of Biliteracy and the CCI (College and Career Indicator).</li> <li>• Represented CABE at the Sobrato Policy Partner meetings in June and August.</li> <li>• Represented CABE at an English Learner Forum at the California Endowment</li> <li>• Facilitated and supported two state level meetings at CABE HQ—the BTPDP grant recipients and the EL Special Education Workgroup</li> <li>• Binational Relationship Development—Implementation of Binational GLAD in July, Plaza Comunitaria, Formadores de docentes, IME Becas, Advisory Board for the Mexican Consulate Ventanillas de Educación.</li> <li>• Submitted proposals (which were accepted) for CABE presentations at CLSBA, CSBA and the CDE Title III Accountability Institute.</li> <li>• Sold property at 16033 East San Bernardino Road, Covina for \$1 million dollars, realizing a substantial profit for the organization.</li> <li>• Developed and co-facilitated the retreat for Coordinating Council (June) and Staff (August)</li> <li>• Supported the development of EL Roadmap palm card in Spanish.</li> <li>• Worked with IT team to create EL Roadmap website.</li> <li>• Supported and oversaw the very successful implementation of the first annual Dual Language Immersion Summer Institute and the Binational GLAD PD in Tijuana—with thanks to the P and E and PDS teams and the Deputy Director for their hands-on planning and implementation.</li> <li>• Met with Elodia Ortega-Lampkin, President, in person and via phone/email regarding CABE programmatic, relational and growth issues.</li> <li>• Met with Barbara Flores in person and via phone as Director of Financial Affairs.</li> <li>• Contacted and communicated via phone and text with incoming board members</li> <li>• Met with CDE staff on a variety of issues—CSA, BCN, CABE, Mexican partnership.</li> <li>• Continued collaborative partnership with Center for Applied Linguistics (CAL)</li> <li>• Met with Finance &amp; Executive Committees in Sept. to discuss fiscal state and Board agenda.</li> <li>• Met with CABE Accounting Consultant on a regular (weekly/daily) basis for budgetary and fiscal reports to close the 2017-18 fiscal year, new bank accounts, and audit.</li> </ul>

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|  | <ul style="list-style-type: none"><li>• Developed preliminary budget which was approved in June and confirmed final budget to be presented to the Board at Sept 15 Board meeting.</li><li>• Met weekly and worked closely with Coordinating Council members on the programmatic and fiscal growth of CAFE and how the development of our work that is directly correlated to the strategic plan and the CAFE Essentials.</li><li>• Emphasized the CAFE Vision and Essentials as our foundation on regular (daily/weekly basis) through all communication, social networking, promoting, branding, legislative action, etc.</li><li>• Met regularly with and supported Martha Zaragoza Diaz (Legislative Advocate) along with Californians Together on policy, CDE, and state board of education issues.</li></ul> |
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# 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>
<ol style="list-style-type: none"> <li>(1) Establishing budgets, budget strategy, and fund development goals for all Strategic Plan/ COMPASS priority projects, as well as for operational priorities;</li> <li>(2) Establishing a system of contract development, management, and monitoring;</li> <li>(3) Establishing a system of fund solicitation strategies;</li> <li>(4) Developing a portfolio of cultivation strategies (“making friends”);</li> <li>(5) Conducting an annual membership drive to increase membership;</li> <li>(6) Maintaining, monitoring, and evaluating the budgeting and fund development plan and process;</li> <li>(7) Raising funds for CAFE’s operations from any and all sources, private and public;</li> <li>(8) Guiding staff and bringing about efficient fiscal operations and activities.</li> </ol>	<ul style="list-style-type: none"> <li>• Ended 2017-2018 Fiscal Year with a surplus and \$1.2 million cash in our checking and savings accounts.</li> <li>• Devised proposal for the investment and allocation of surplus cash to rebuild our reserve and to create financial stability for the organization.</li> <li>• Prepared for and met with auditors (in conjunction with Accounting Consultant) from Clifton Larson and Allen on Sept 7 to initiate the 2018 audit.</li> <li>• Met with project officers from the California Community Foundation, the California Endowment, and the Sobrato Foundation regarding projected funding and planning.</li> <li>• Finalized sale of 16033 East San Bernardino Road for \$1 million-May 15, 2018.</li> <li>• Secured \$ 2,874,995 in grant funding.</li> <li>• Developed and implemented plans of action for the above grants from the Sobrato Family Foundation, USDOE NPD grant, California Endowment, and the California Collaborative for Educational Excellence.</li> <li>• Submitted annual reports for grants from Sobrato, The California Endowment, and IME.</li> <li>• Coordinated with the Project Director for the i3Grant (Maria Quezada) and Director of PFE, Maria Villa, on the final grant reporting requirements.</li> <li>• Worked extensively with accounting consultant, business team and coordinating council to implement budget for 2018-2019 with fidelity and to develop the final 2018-19 budget.</li> <li>• Met with Director of Finance, Barbara Flores in person and via phone on 2018-2019 budget process and investment plan for reserves.</li> <li>• Planned for and facilitated quarterly call with the Financial Committee.</li> <li>• Met and surpassed the year end revenue goals for P2i and PDS</li> <li>• Submitted report for funding received for the new round of Plaza Comunitaria grants with the Los Angeles and San Bernardino Consulate through IME Becas grants.</li> <li>• Requested and supported coordinating council members meeting with Accountant Consultant on at least a monthly basis to review program budgets.</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> </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>• Inducted new board members at the June Board meeting as part of the ABE 2018 Board Election process.</li> <li>• Planned and prepared 2018 Board Retreat and Board Meeting—September 13-15, 2018.</li> <li>• Met with Elodia Ortega-Lampkin, President, in person and via phone/email regarding CABA programmatic, relational and growth areas.</li> <li>• Held discussions with NABA and DLeNM leadership.</li> <li>• Engaged CABA Board in the development and review of the CABA Vision, Mission and Theory of Action and the continuation of the renewal and revision of our strategic plan</li> <li>• Invited and confirmed Board members to attend and participate in UNIDOS US Conference, CALSA, Binational GLAD, DLI Summer Institute, CABR 2019 and 2019 planning committee meetings, and CABA PD offerings.</li> <li>• Worked and coordinated closely with the Director of Legislative affairs and CABA Lobbyist on policy issues.</li> <li>• Provided orientations to new Director of Legislative Affairs.</li> <li>• Met with Executive and Finance committees in preparation for September Board meeting.</li> <li>• Continued the implementation of Basecamp for communication and file sharing</li> <li>• Concurred regularly with Legal Counsel, Mary Hernandez and Aerobel Bañuelos, on several issues in relation to and impacting the board (contracts, plans, elections).</li> <li>• Continue to lead staff and board in refocusing on the goals and priorities of the CABA Compass.</li> </ul>

## GOAL AREA #5

<b>STAFF ENGAGEMENT &amp; LEADERSHIP</b>	<i>(Refer to Strategic Plan/COMPASS Action Plan 4.5)</i>
<b>RESPONSIBILITIES &amp; DUTIES</b>	<b>CEO REPORT</b>
<ol style="list-style-type: none"> <li>(1) Creating an office culture of quality service, support, leadership, and accountability;</li> <li>(2) Engaging all staff in the development of work teams and work plans tied directly to the CAFE strategic plan.</li> <li>(3) Intentionally seeking alignment across CAFE departments and teams to build CAFE’s capacity for leadership, engagement, and accountability.</li> <li>(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.</li> <li>(5) Developing professional growth plans with staff to support their advancement and learning.</li> </ol>	<ul style="list-style-type: none"> <li>• Led/co-facilitated Staff Retreat in August, 2018, in Long Beach (location of CAFE 2019)—CONNECTING ACROSS THE Cs--Communication • Collaboration • Creativity • Critical Thinking • Consideration • Compassion. (See attached)</li> <li>• Led/co-facilitated Coordinating Council Retreat in June 2018, Thinking Back, Being Present, Looking Forward. (See attached)</li> <li>• Met daily with Deputy Director for coordination, support, training and implementation</li> <li>• Met regularly with staff—whole staff meetings, coordinating council, teams, and individuals.</li> <li>• Developing job descriptions for two new PT positions.</li> <li>• Welcomed Gloria Inzunza Franco to the team as consultant for annual conference workshops and presentations.</li> <li>• Engaged with staff on going regarding planning and organization for CAFE 2019 and regional conferences.</li> <li>• Accepted the resignation of team member and consulted with legal counsel regarding employment issues.</li> <li>• 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.</li> <li>• Prioritize touching base and meeting personally with each staff member every week.</li> <li>• Met with Coordinating Council Biweekly as group and individual members weekly or biweekly</li> <li>• Met with managers regarding the development and implementation of the CAFE 2018-19 budget.</li> <li>• Continued to encourage and guide team collaboration, planning and growth</li> <li>• Regularly engaged team in discussions regarding leadership during coordination council</li> <li>• Continue to encourage and build staff level of professionalism, growth, and cross team connections.</li> <li>• Met with close CAFE partners for input and feedback on CAFE programs and offerings.</li> <li>• Support systemic growth and use of technology throughout staff to improve services—attending off site trainings, supporting implementation of new CAFE Email—gocafe.org, upgrading software, hardware, trainings on different software, ransom-virus, etc.</li> <li>• Celebrated birthdays, holidays, graduations and special events and honored losses.</li> </ul>

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|  | <ul style="list-style-type: none"><li>• Provided encouragement and recognition to staff for their dedicated efforts by celebrating birthdays, providing Starbucks run, lunch at staff meetings, and regular treats.</li><li>• Recognized staff work anniversaries at the CAFE Board Installation luncheon.</li><li>• Addressed growth and performance needs with different staff members</li><li>• Focused with team on creating systemic and organized flows to work projects to enhance professionalism and efficiently in work.</li><li>• Met with key partners, experts and colleagues to ask for insight and feedback on CAFE's growth and future development work.</li></ul> |
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## 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.

- Celebrated the success of our successful 2017-18 program year and the impactful contributions of each staff member.
- Begin to plan for CAFE 2019—invitation of Honorary Chairs, Co Chairs, first planning committee meeting and artwork and theme.
- Met with contractor to get bid on building improvements (large conference room/office space, patio, and other misc areas.)
- Continued to support and collaborate with Deputy Director, Cynthia Vasquez Pettit.
- Supported the development of Project BEST and leadership of Ivanna Soto with the Sobrato grant.
- Conducted a meeting team member involved in delivery of professional development content to build connections and support systems for the content and curriculum we provide.
- Realized successful CAFE Board meeting and Installation luncheon in June
- Realized successful Coordinating Council retreat and Staff retreat in June and August.
- Continually and regularly spoke about and share the CAFE vision and mission with partners, clients and staff—NCLR, CAFE 2018 Planning Committee, Cal Tog, ELPLN, ELLLI, CARECEN, CALSA, CLSBA, DLeNM, CSBA, ACSA, PTA, CTA, CAL, CDE, National EL Round Table, NABE, EdTrust West, Advancement Project, CCTC, etc.
- Maintained International Relationships with IME & SRE, Spanish Embassy and Consulate, and Confucius Institutes.
- Communicated regularly with staff through all modes of dialogue and communication.
- Continued to support the full implementation of the Telepayroll and Bill.com system
- Used and promoted social media to support CAFE events, ideas and resources—recently surpassed 5773 likes on FB. Also increase presence on Twitter, Instagram and Linked-In
- Continued to develop systems and protocols for efficient and smooth office operations.
- Focused on addressing, building awareness & implementing the CAFE Compass
- Supported CABTE as organizational affiliate

## **TRAVEL**

### **Travel Conducted for June 2018-September 2018**

- Lake Tahoe---CALSA (with CAFE Board President)
- New York—Advisory Board for Ventanillas de educacion
- Monterey—DLI Summer Institute
- Tijuana—Binational GLAD

### **Forecasted Travel for September – December 2018**

- Sacramento—SBE, BCN
- Washington DC—National EL Roundtable
- Santa Fe—La Cosecha
- Monterey and Bakersfield—Regional Conferences
- Tijuana and San Diego—Binational GLAD
- San Diego—ELLLI
- San Francisco/Oakland—Chinese programs

### **Time Off:**

I will be taking days off from September 27-October 3, 2018