

**CABE STRATEGIC PLAN
ANNUAL SUMMARY REPORT
July 2016-June 2017**



PRIORITY CLAIM/GOAL: 4.6 Budget & Fund Development

Project Manager: Jan Corea

DESCRIPTION: Develop multi-year budget and fund development plans to help the staff and board set realistic income goals with respect to the annual budgeting process and implementation of the CABE COMPASS; outline the strategic steps required to reach those goals, as well as board and staff responsibilities in accomplishing the plans; and identify targeted financial and strategic goals necessary to support successful COMPASS implementation.

IN PROCESS

COMPLETED

NOT YET STARTED

ACTIONS	KEY EVIDENCE	PRIORITY STEPS FOR 2017-18
<p>4.6.1 Establish budgets, budget strategy, and fund development goals for all COMPASS action plans.</p>	<ul style="list-style-type: none"> • Budget process for each area of the strategic plan and each department in CABE, as aligned to the Strategic Plan, has been developed and implemented. • Organization-wide, electronic accounting systems (Quick Books, Bill.com, etc.) have been put in place for accurate, up to date processing and information for each priority area of the strategic plan. • Each director/coordinator has grown to learn how to read, manage and develop budgets for their areas of focus in the strategic plan. • Priority focus areas 	<ul style="list-style-type: none"> • Maintain current processes for consistency and to build growth • Explore and identify parts of the strategic plan, beyond the priority areas, that we may be ready to begin to implement or have begun to implement as part of our growth. •

ACTIONS	KEY EVIDENCE	PRIORITY STEPS FOR 2017-18
	<p>have received increased funding for implementation.</p> <ul style="list-style-type: none"> • Fund development plan is developed each year with the development of the organizational budget. • Realized a surplus of at least \$265,000 for the 2016-17 fiscal year. 	
<p>4.6.2 Establish a system of contract development, management, and monitoring.</p>	<ul style="list-style-type: none"> • On line and internal system has been created and implemented by Administrative Systems Manager, Directors of P2I and PDS, and Consultant for Accounting Management 	<ul style="list-style-type: none"> • Maintain and strengthen system in place
<p>4.6.3 Establish a system of fund solicitation strategies.</p>	<ul style="list-style-type: none"> • A system consisting of fund solicitation has been developed and implemented including revenue based services, sponsorships, and grant/donation development. • Secured \$1,050,000 in grant funding for 2017-2019 (Sobrato, California Endowment and CCEE). Awaiting news on NPD grant in September. • Surpassed CABA 2017 sponsorship goals 	<ul style="list-style-type: none"> • Maintain current process • Implement plan for increased grant and foundation funding • Increase annual conference sponsorship and ad commitments
<p>4.6.4 Develop a portfolio of cultivation strategies (“making friends”).</p>	<ul style="list-style-type: none"> • CEO has met with foundations, state agencies and private funders. 	<ul style="list-style-type: none"> • Create a funding campaign for the Binational Project.

ACTIONS	KEY EVIDENCE	PRIORITY STEPS FOR 2017-18
<p>4.6.5 Conduct an annual membership drive to increase membership.</p>	<ul style="list-style-type: none"> • The annual conference registration process continues to be our most impactful strategy in maintaining and building our membership (through discounted conference registration fees). • The Consultant for Membership has implemented strategies to consolidate, align, and build membership through increased membership, membership events, membership promotion, and new chapter development 	<ul style="list-style-type: none"> • Expand membership team and resources to increase engagement and support for members. • Hire a position in CAFE to be focused on cultivating, engaging, and growing member relationships. • Engage our membership throughout the year in professional and advocacy oriented actions and activities.
<p>4.6.6 Maintain, monitor, and evaluate the budgeting and fund development plan and process.</p>	<ul style="list-style-type: none"> • Annual results—in the past five years we have increased our budget by 53% • We have built back a reserve of \$1 million • Ongoing process • Input from Managers, Accountant, and Board • Paid off our current building 	<ul style="list-style-type: none"> • On going • Purchase of new building