

<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>• Led Staff Meetings in January, February and March 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 to present at the CABE 2018 and Anaheim and Riverside Regional Conferences. Planned and strategized for the no cost extension 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 weekly supporting the work on the Professional Development Framework and collaboration and planning for the future with PDS and planning the 2018-2109 conference/professional development offerings</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 2018 website.</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, Prop 58 implementation, grant development, and ELLLI)</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 partnerships with Mexico—IME, SEE, INEA. Strong emphasis was placed on the presence and participation of the Mexican Government and Delegation at the CABE 2018</li> </ul>

conference, the Binational GLAD partnership, meeting new Secretary of Education of Baja California, and confirming MOU with IME.

- Communicated regularly with Membership Team to continue use of Basecamp, Smart Reg Membership Database, chapter consolidation, and membership receptions)
- Included information and reminders for CAFE Team members on the impact and relevance of the Strategic Plan on our daily tasks and rolls and responsibilities.
- 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.

## 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.

- Welcomed and created work plan for new Deputy Director, Cynthia Vasquez Pettitt.
- Completed move and tenant improvements in new building for CABE.
- Supported the development of Project BEST and leadership of Ivanna Soto with the Sobrato grant.
- Followed through with Realtor to put our old building up for sale.
- Leading the organization in the process for the sale of the old building
- Met with Assembly member Tony Thurmond.
- Met with Elodia Ortega-Lampkin, President, in person and via phone/email regarding CABE programmatic, relational and growth issues.
- Met with Barbara Flores in person and via phone as Director of Financial Affairs.
- Contacted and communicated via phone and text with incoming board members
- Met with CDE staff on a variety of issues—CSA, BCN, CABE, Mexican partnership.
- Presented at March 2018 BCN—Bilingual Coordinators Network
- Continued collaborative partnership with Center for Applied Linguistics (CAL)
- Met with Finance and Executive Committees in March to discuss fiscal state and March agenda.
- Met with CABE Accounting Consultant on a regular (weekly/daily) basis for budgetary and fiscal reports for the second and third quarters of 2017-18, and the sale of the old building.
- Met weekly and worked closely with Coordinating Council members on the programmatic and fiscal growth of CABE the development of our work that is directly correlated to the strategic plan and the CABE Essentials.
- Continued to work closely and meet weekly with CABE Accounting Consultant, Yvette Chong-Coontz to ensure that funding structures are in place in the final 2017-18 budget to support the implementation and growth of the strategic plan—specifically re 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 on policy, CDE, and state board of education issues.
- Attended the steering group meetings 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.

# 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 CABE’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>• Finalizing sale of 16033 East San Bernardino Road for \$1 million.</li> <li>• Developed plans of action for grants from the Sobrato Family Foundation, USDOE NPD grant, California Endowment, and the California Collaborative for Educational Excellence.</li> <li>• Submitted mid year and annual reports for grants from Sobrato, The California Endowment, and IME.</li> <li>• Coordinated with the Project Director for the i3Grant (Maria Quezada) on the no cost extension budget and final grant reporting requirements.</li> <li>• Worked with team and secured over \$180,000 in sponsorships for CABE 2018.</li> <li>• Worked extensively with accounting consultant, business team and coordinating council to implement budget for 2017-18 with fidelity.</li> <li>• Met with Director of Finance, Barbara Flores in person and via phone on final 2017-2018 budget and new building process.</li> <li>• Planned for and facilitated quarterly call with the Financial Committee.</li> <li>• Met and surpassed the revenue goals for P2i and PDS</li> <li>• Submitted application for the new round of Plaza Comunitaria grants with the Los Angeles and San Bernardino Consulate through IME Becas grants.</li> <li>• Worked with Accounting Consultant to move investment policy and strategy forward and to transfer funds for deposit on the new building.</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 CABE Board in effectively and compellingly understanding, communicating, and enacting the CABE 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 CABE 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, in person with board members.</li> <li>• Organized and facilitated the proxy vote process for the CABE Membership meeting.</li> <li>• Addressed issues and questions regarding the proxy vote process.</li> <li>• Planned for and organized CABE Board member schedules and involvement at CABE 2018.</li> <li>• Met with Elodia Ortega-Lampkin, President, in person and via phone/email regarding CABE programmatic, relational and growth areas.</li> <li>• Held discussions with NABE leadership</li> <li>• Invited and confirmed Board members to attend and participate in NABE conference, CABE Regional conference in Anaheim, P2i graduations, 2018 planning committee meetings, and CABE PD offerings .</li> <li>• Worked and coordinated closely with the Director of Legislative affairs and CABE Lobbyist on policy issues.</li> <li>• Provided orientation to new Director of Legislative Affairs.</li> <li>• Met with Executive and Finance committees in preparation for March 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 in refocusing on the goals and priorities of the CABE Compass</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.

- Facilitated CAFE move-in and development of new systems at new building.
- Welcomed new staff—Cynthia Vasquez Petitt, Deputy Director and provided orientation and support.
- Led Staff meetings in Jan, Feb., and March
- Met regularly with staff—whole staff meetings, coordinating council, teams, and individuals.
- Engaged with staff on going regarding planning and organization for CAFE 2018.
- 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.
- Prioritize touching base and meeting personally with each staff member every week.
- 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.
- Met with close CAFE partners for input and feedback on CAFE programs and offerings.
- Support systemic growth and use of technology throughout staff to improve services—attending off site trainings, supporting implementation of new CAFE Email—gocabe.org, upgrading software, hardware, trainings on different software, ransom-virus, etc.
- Celebrated birthdays, holidays, graduations and special events and honored losses.
- Provided encouragement and recognition to staff for their dedicated efforts by celebrating birthdays, providing Starbucks run, lunch at staff meetings, and regular treats.
- 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.
- Met with key partners, experts and colleagues to ask for insight and feedback on CAFE's growth and future development work.

## GOAL AREA #6

### OPERATIONAL LEADERSHIP

*Manage the operation and administration of the CABA organization to ensure CABA'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.
- Organized and facilitated the proxy vote process for the CABA Membership meeting. Addressed questions and issues regarding the process and proposal for bylaw changes.
  - Provided direction, input and support to the planning of the CABA 2018 conference –staff roles, invitation to districts and Honorary Co-Chairs, location, contracts, speakers, structures, brochures, etc.
  - Continually and regularly spoke about and share the CABA vision and mission with partners, clients and staff—NCLR, CABA 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.
  - Work with Executive Assistant and Legal Counsel to update ByLaws and CABA Policy Handbook.
  - Continued to support the full implementation of the Telepayroll and Bill.com system
  - Used and promoted social media to support CABA 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 CABA Compass
  - Supported CABTE as organizational affiliate

## **TRAVEL**

### **Travel Conducted November 2017-January 2018**

- Sacramento—2018 Planning Committee, Meeting with Board President, Legislative Advocacy, SBE, meeting with—CDE, BCN, ELPLN, ELLLI
- Albuquerque-- NABE
- Anaheim—CABE Regional Event

### **Forecasted Travel for March 2018-June 2018**

- Sacramento—CABE 2018 PC and Conference, SBE, BCN, ELPLN
- Washington DC—National EL Roundtable and UNIDOS US,
- Tijuana—Binational GLAD
- Long Beach—CABE 2019 planning



## **KEY EVENTS/PRIMARY AREAS OF FOCUS—January-March 2018**

- Move-in to new building and Celebration through CABE Open House
- Sale of old building
- Welcome, orientate and support 3 new staff members
- CABE 2018 Planning and Support, Sponsors, work with team members, timelines
- Regular meetings with staff and Team Leads/Coordinating Council, Staff Meetings
- Close of i3 grant and planning for No Cost Extension and end of project reports and data analysis
- Support of NPD grant in Rialto and Fontana
- Partner meetings—Cal Tog, ELLLI, Advancement Project, Sobrato, NABE, CAL,
- Grant Implementation and Support—NPD, Sobrato, CCEE, CA Endowment, IME Becas
- Policy and Legislative Work
- Program Growth-PDS, P2I, P and E, IT and Graphic Design
- Prepare for Membership meeting and Proxy vote process
- Guide and support membership engagement and CABE Booth Set up at regional and annual conferences.
- Support team member during time of family loss
- Facilitate the in-house process for meeting room reservations and maintenance
- Attended NABE and met with NABE leadership.
- Presented at BCN and meetings at CDE.
- Met with Mexican, Spanish and Chinese colleagues regarding their involvement at CABE 2018.
- Contacted CABE 2018 speakers, presenters, participants, special guests, gubernatorial candidates, award winners, sponsors, etc.