

**CABE STRATEGIC PLAN
ANNUAL SUMMARY REPORT
2013- 2018**



PRIORITY CLAIM/GOAL: 4.6 Budget & Fund Development
 Project Manager: Jan Gustafson-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.

ACTIONS	KEY EVIDENCE
4.6.1 Establish budgets, budget strategy, and fund development goals for all COMPASS action plans.	<ul style="list-style-type: none"> • Recovered from a deficit budget in 2012-2013 and 2013-2014 • Realized a surplus budget in 2014-15, 2015-2016, 2016-2017, and 2017-2018 • 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 have received increased funding for implementation. • Fund development plan is developed each year with the development of the organizational budget.
4.6.2 Establish a system of contract development, management, and monitoring.	<ul style="list-style-type: none"> • On line and internal system has been created and implemented by Administrative Systems Manager, Directors of P21 and PDS, and Consultant for Accounting Management

ACTIONS	KEY EVIDENCE
4.6.3 Establish a system of fund solicitation strategies.	<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 grants from 2013-2018 in a total of \$3,980,000
4.6.4 Develop a portfolio of cultivation strategies (“making friends”).	<ul style="list-style-type: none"> • CEO has met with foundations, state agencies and private funders. • Met and surpassed annual conference sponsorship goals 2013-2018.
4.6.5 Conduct an annual membership drive to increase membership.	<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
4.6.6 Maintain, monitor, and evaluate the budgeting and fund development plan and process.	<ul style="list-style-type: none"> • Successfully completed the purchase of a new building for CABA and the sale of the old building. • Annual results—in the past six years we have increased our annual budget by 56% (From \$2, 471,681 to \$5,528,808). • After purchase of new building, we have built back a reserve of \$950,000 (2018) • Input from Managers, Accountant, and Board • Paid off building at 16033 East San Bernardino Road • Ongoing process